

# 101: Explore an example assistant

## In this section

Explore what a virtual assistant built with Watson Assistant looks like from various persona perspectives.

---

## Table of Contents

<b>101: Explore an example assistant .....</b>	<b>1</b>
End user's perspective .....	2
Set up Watson Assistant.....	4
Builder's perspective .....	11
Product manager's perspective.....	16
<b>Report an issue .....</b>	<b>19</b>
<b>Appendix: How to extend your trial.....</b>	<b>20</b>

---

Watson Assistant is a conversational artificial intelligence platform with a wide set of features for building, testing, deploying, analyzing, and integrating virtual assistants.

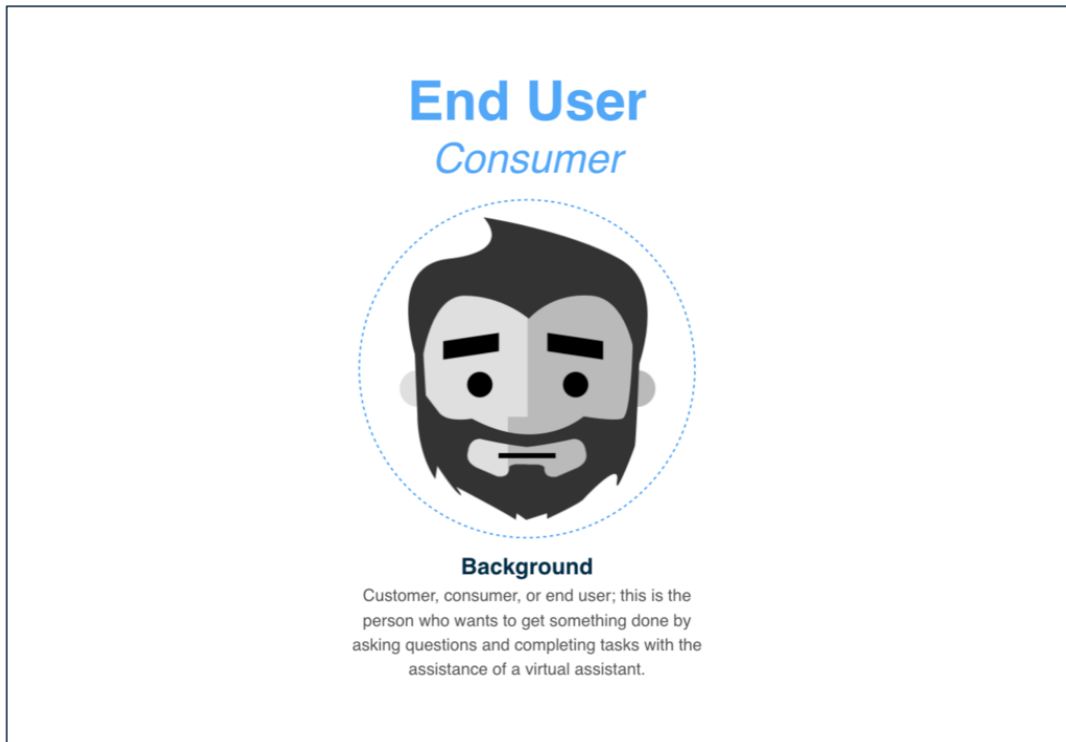
Virtual assistants, when powered by Watson Assistant, make customer interactions friendlier and faster. Watson Assistant's conversational AI platform removes the friction of traditional support and provides exceptional customer care, by delivering answers to hundreds of thousands of questions with 95% accuracy (<https://www.ibm.com/watson/stories/bradescio>), across all channels and customer touchpoints, 24x7.

Watson Assistant also provides an intuitive interface that empowers everyone in an organization to build and maintain AI-powered virtual agents and AI-powered chatbots — without having to write a single line of code.

Before you start learning about Watson Assistant and how to **use** its many features, this section of the lab will have you **explore** Watson Assistant from a few different perspectives.

## End user's perspective

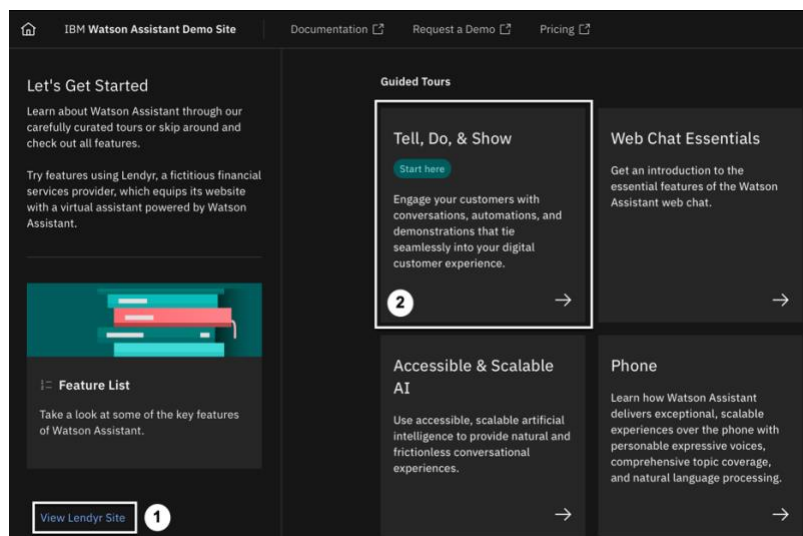
Here is an end user persona:



Imagine you are an end user, and explore this virtual assistant built with Watson Assistant.

[lendyr.com](https://lendyr.com)

Click the above link to explore and interact with the Lendyr Bank virtual assistant either by clicking **View Lendyr Site (1)** or one of the Guided Tour tiles (2):



Try running through some of these conversations with the assistant.

Conversation #1	Conversation #2	Conversation #3	Conversation #4
Send: I want to apply for a student loan	Send: Hey, I want to use the mortgage calculator	Send: hey I want to send a million dollars to myself	Send: loan application
Send: What's the limit on loan amounts?	Send: 400,000	Send: tomorrow	
Send: I'm coming from high school	Send: actually make it \$300,000	Send: ugh just let me talk to a real person please!!!!	

What features or functionality do you see in this assistant? Don't worry about using technical terms in your answer; describe them however you'd like.

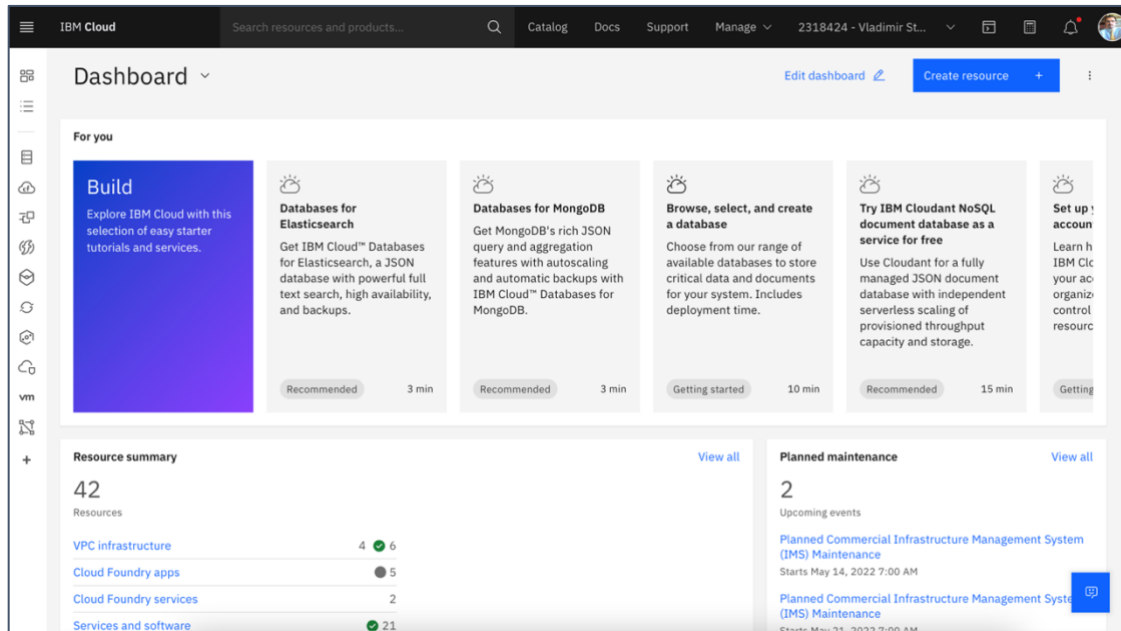
Are there any additional features or functionality you would like to see?

Here are some of the features and functionality you saw in this assistant:

- Asking questions as an end user
- Identifying the question that the end user is asking, or the action they want to take
- Allowing the end user to interrupt the conversation
- Doing something different if the end user answers "yes" versus answering "no"
- Starting over when something goes wrong
- A panel where the end user has the conversation with the assistant
- Synonyms and context (loan coming from high school = will be an undergraduate student)
- The list of features on the left-hand navigation menu [here](#)

## Set up Watson Assistant

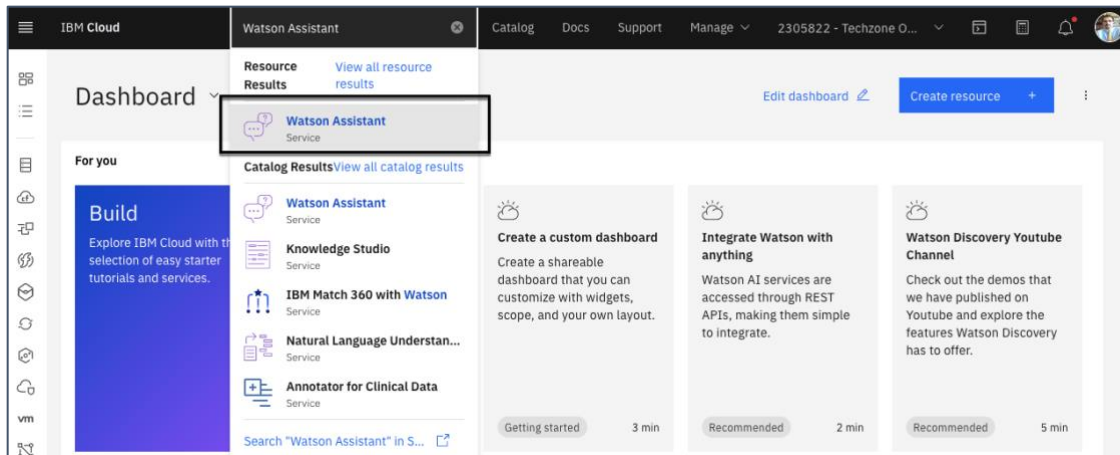
Next, you will explore how this virtual assistant works by gaining access to an instance of Watson Assistant. First, log onto [IBM Cloud](#) with your personal IBM Cloud account. You should see a landing page similar to the image below:



If you already have a Trial, Plus, or Enterprise instance of Watson Assistant, open it up and create a new assistant. If you don't have an instance of Watson Assistant, follow these instructions to create a **free** Trial instance.

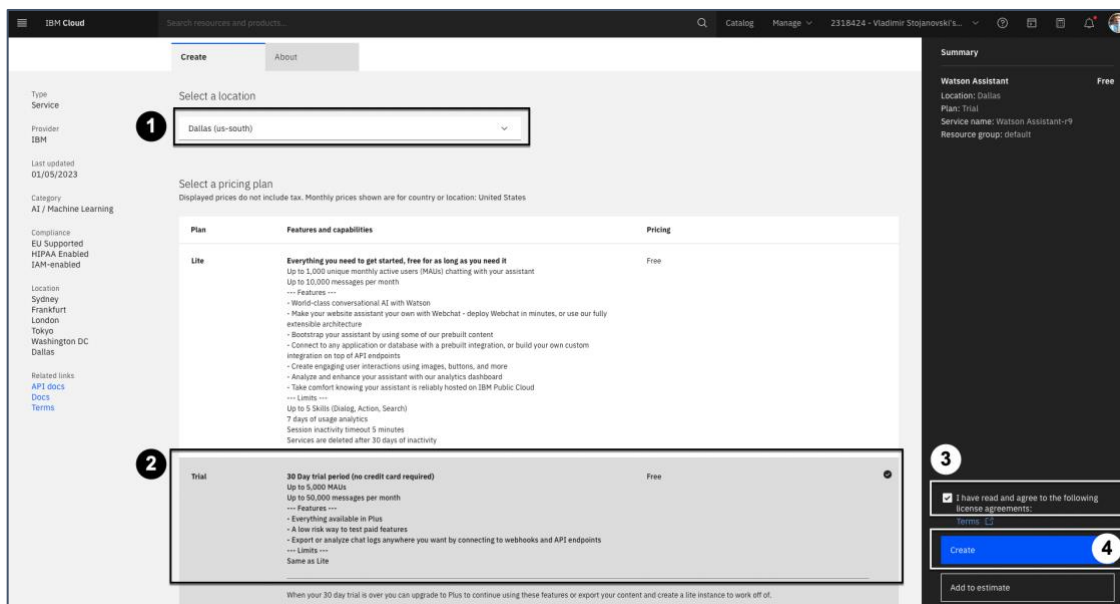
*Note: Watson Assistant offers a free 30-day Trial plan. The trial period can be extended; instructions on how to extend the trial are at the end of this lab section.*

To create a **free** Trial instance, Search for “Watson Assistant” in the top search bar and click **Watson Assistant** under **Catalog Results**, as shown below:

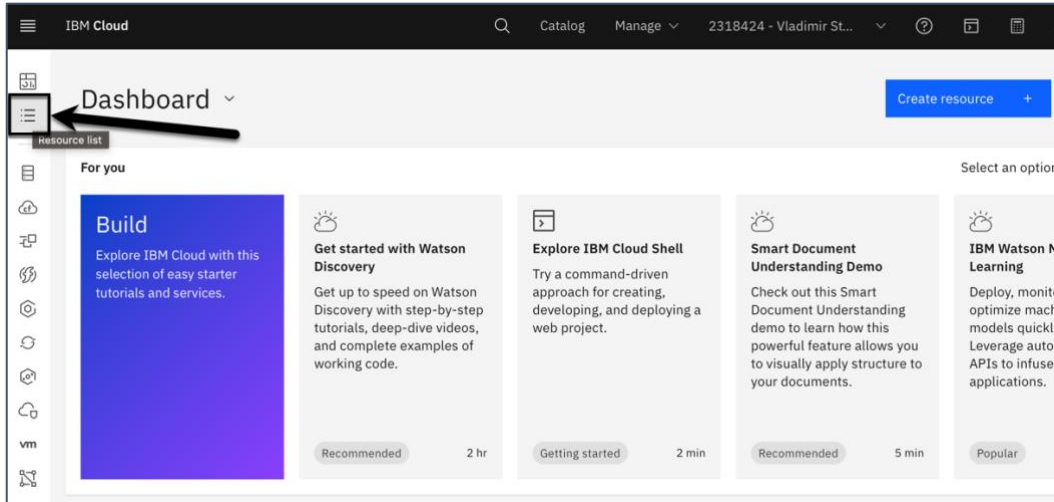


Next, as shown below,

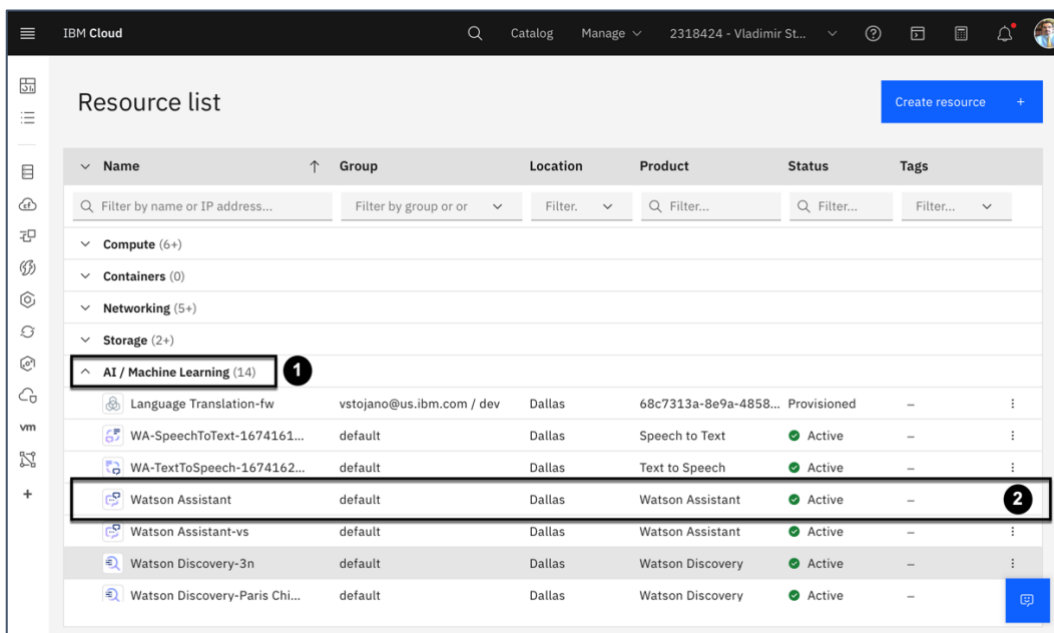
1. Select the region that's closest to your location.
2. Select the **Trial** pricing plan. (This is the trial version of the Plus pricing plan.)
3. Agree to the **Terms and Conditions**.
4. Click on the **Create** button in the lower-right area of the page.



You should now have all the building blocks for your virtual assistant. To validate that everything is in order, check the IBM Cloud resource list by clicking the **Resource list** icon on the left-hand navigation menu:



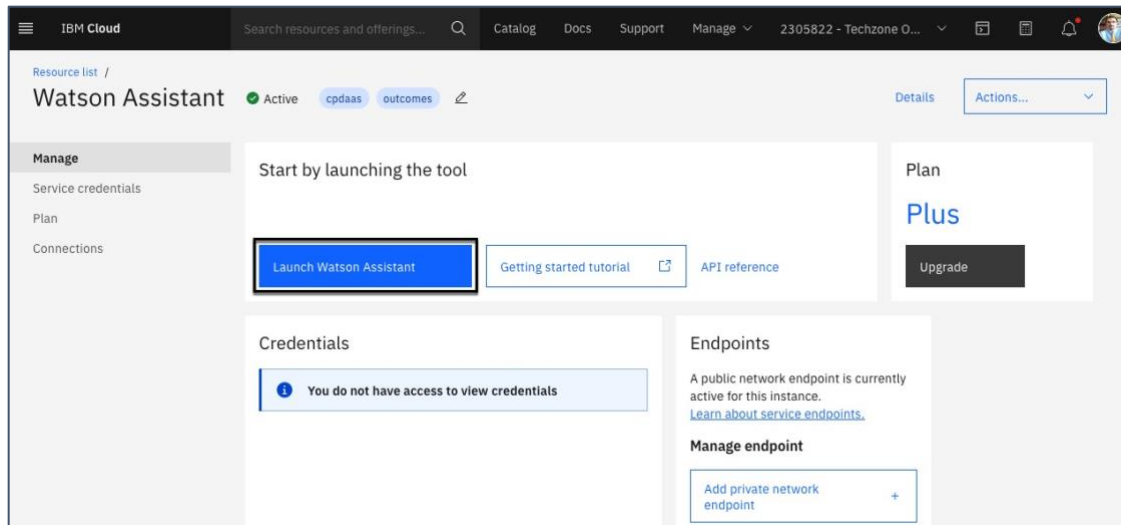
You should see a list of your provisioned services. Under **AI/Machine Learning (1)**, you will find your **Watson Assistant (2)** service, similarly to the image below:



Note: The service you create may have a suffix, like “Watson Assistant-hu.” These names are identifiers for you to distinguish between the multiple services you may create. You can change them if you like.

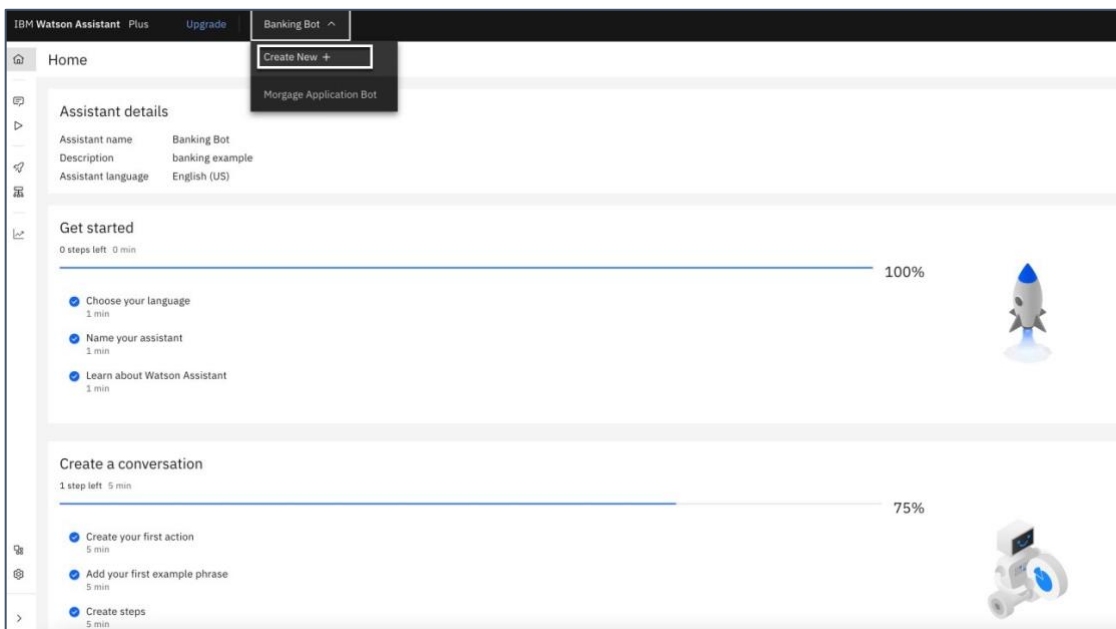
To launch Watson Assistant, click on the **Watson Assistant (2)** service you just created, as shown on the image above.

Then, as shown on the image below, click the **Launch Watson Assistant** button to open the Watson Assistant home page:



If this is your first time using this instance, an onboarding wizard will walk you through creating your first assistant. Follow along with the onboarding wizard, as shown on the next page.

*Note: If you've created a Watson Assistant instance previously, then you must create a new virtual assistant for this lab, rather than using the one you may have created previously. To do so, you can either follow the same steps shown above, or, from your existing instance's Home page, you can click on the call out button on the top bar and then **Create new**:*



*Continue to follow the steps below.*

1. For the **Assistant name** type “Lendyr Lab” (or another name you prefer).
2. Provide a simple description.
3. Click **Next**.

IBM Watson Assistant Trial 30 days left Extend trial Learning center ?

Welcome to the new Watson Assistant

3 Next

Create Personalize Customize Preview

Create your first assistant

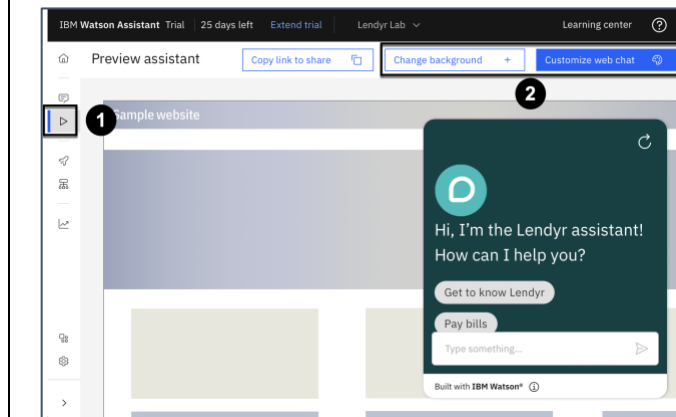
Let's get your assistant up and running. Name your assistant, add a description, and choose a language. In following steps we'll gather more information, show you basic customizations, and give you a preview of what your assistant will look like.

1 Assistant name  
Lendyr Lab  
Your assistant name will be kept internally and not visible to your customers

2 Description (optional) 43/128  
Banking assistant for Lendyr Bank customers

Assistant language  
English (US)  
This is the language your assistant will speak.

*If you do not see this screen, it's likely you are reusing an existing assistant. If so, continue on with these instructions. At a later time, you can change the look of your assistant through the **Preview (1)** page and then clicking on **Change background** and **Customize web chat (2)**:*



On the following screen, make these selections:

1. Select **Web** as this assistant will be accessed via a web browser channel.
2. Select **Banking and financial services** as the industry.
3. Select **Developer** as our builder persona.
4. Select **I want to provide confident answers to common questions** as the main purpose of the assistant.
5. Your screen should look like the screenshot below; click **Next**.



IBM Watson Assistant Trial 30 days left Extend trial Lendyr Lab Learning center

## Welcome to the new Watson Assistant

Back Next

Create Personalize Customize Preview

### Personalize your assistant

**Tell us where your assistant will live**  
We will create your first channel integration for you, which will be visible on your dashboard. You can always add more or change later.

Where do you plan on deploying your assistant?  
1 Web

**Tell us about yourself**  
This information will be used to personalize your onboarding experience.

Which industry do you work in?  
2 Banking and financial services

What is your role on the team building the assistant?  
3 Developer

Which statement describes your needs best?  
4 I want to provide confident answers to common question

This is what your customers will experience

Watson Assistant

Do you have the Speed Demons in stock?

The Speed Demons are in stock at our Downtown and Northgate locations, which are both within five miles of you.

What size and color do you need?

I'm looking for a size nine in white

Great news! The Speed Demons are available in white in a size 9.

You can purchase them for curbside pick up or we can ship them to you. Which would you prefer?

I'll pick them up! Ship them to me, please!

5

The next screen allows you to change the look and feel of your assistant. We'll cover this later, so just click **Next** at this time:

IBM Watson Assistant Trial 30 days left Extend trial Lendyr Lab Learning center

## Welcome to the new Watson Assistant

Back Next

Create Personalize Customize Preview

### Customize your chat UI

Update the style to match your brand and your website. A developer can also add more advanced styling changes with code. [Learn more](#)

Assistant's name as known by customers  
Watson Assistant

Primary color #FFFFFF Secondary color #3D3D3D

Chat header User message bubble

Accent color #0354E9

Significant and interactive objects

**IBM Watermark**  
Displays a link to the Watson Assistant website  
On

Restart conversation

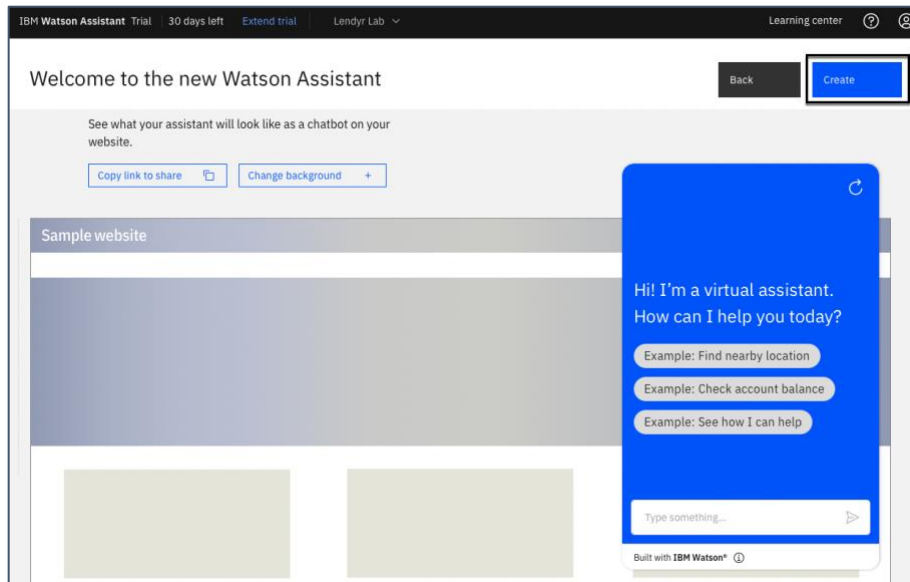
Hi! I'm a virtual assistant. How can I help you today?

Example: Find nearby location

Example: Check account balance

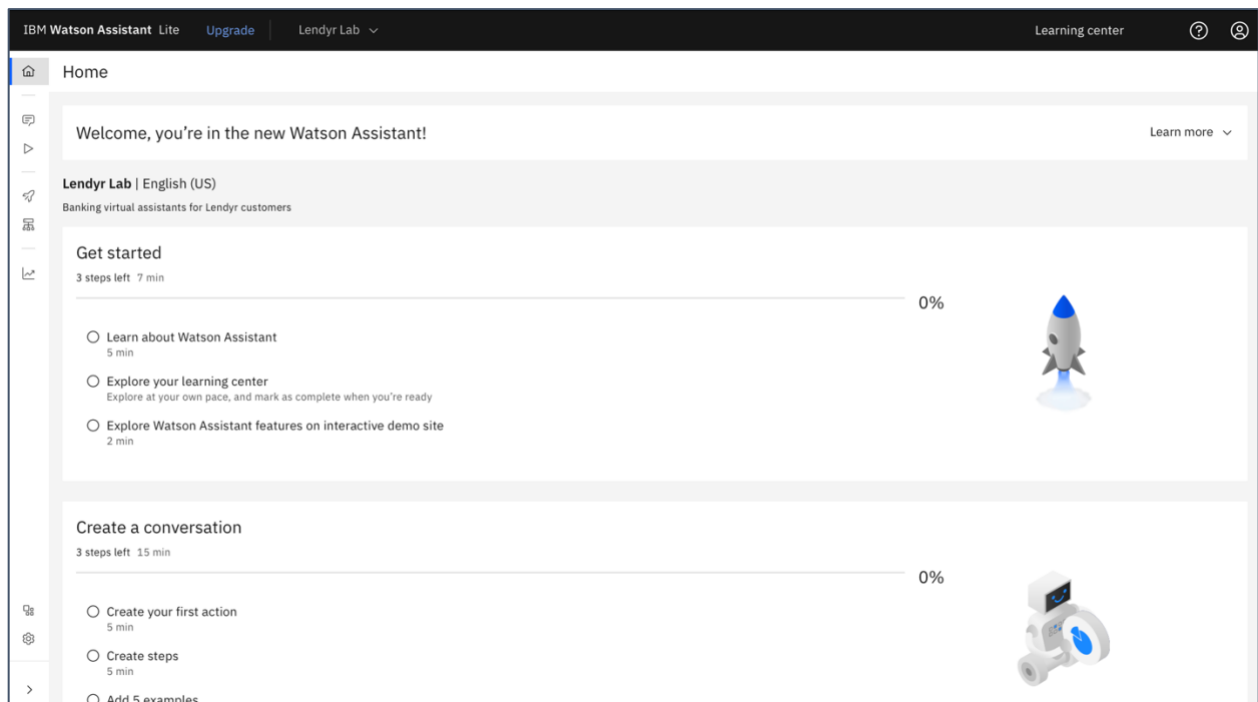
Example: See how I can help

The last step allows you to preview the web chat. The preview capability will also be covered later in this lab. Click **Create**:



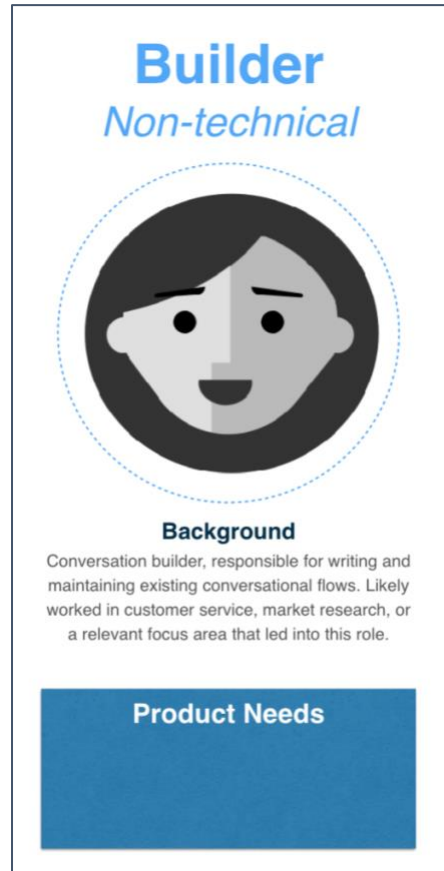
*Note: If this was your first time creating an assistant within your Watson Assistant service instance, you will see the top bar now reflecting that you are working under your **Lendyr Lab**, and you can move to the next section.*

Finally, as shown on the image below, you will see the Home page of your new assistant (your home page may look slightly different based on which suggested checklist items you've completed):



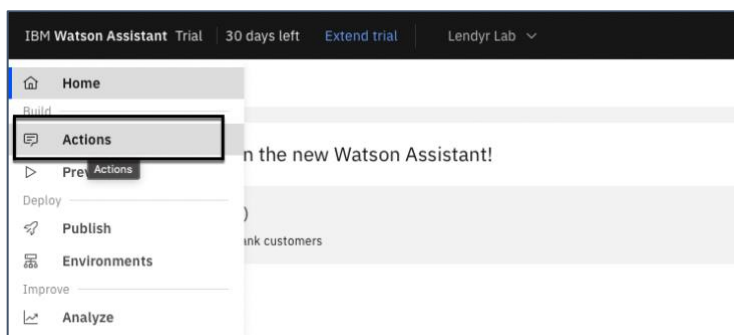
## Builder's perspective

Let's explore the perspective of a builder. What is the builder's background? Read the profile below.



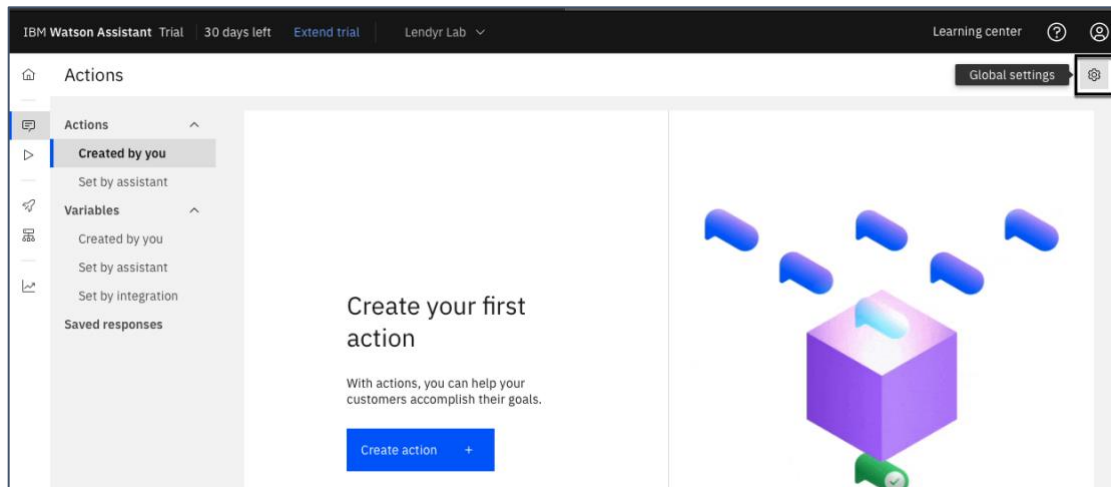
To explore their perspective, you will create a copy of the Lendyr.com demo assistant in this new assistant.

From the Home page, click on the **Actions** tab on the left-hand side. This is where a builder writes the content that a virtual assistant will be trained to answer:



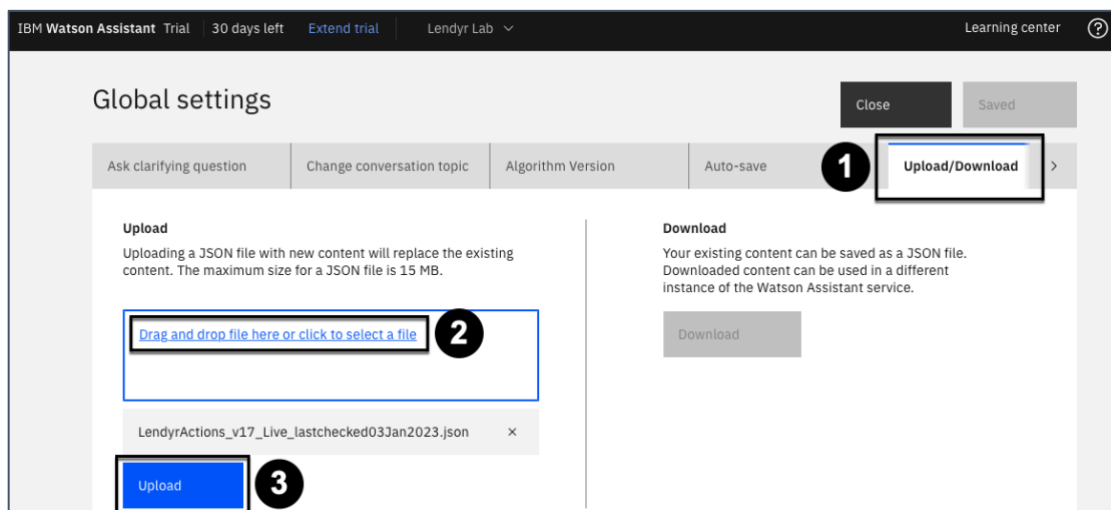
Actions are a representation of the tasks you want your assistant to help your customers with. Each action contains a series of steps that represent individual exchanges with a customer. Actions allow you to build an Assistant that can easily converse with a customer with **no coding** knowledge needed!

Click the **Global settings** button, in the top right:

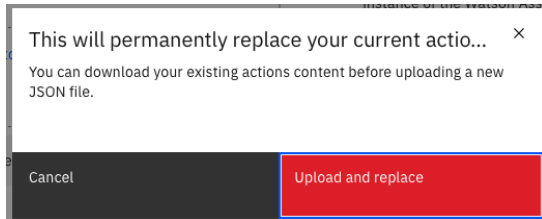


Then,

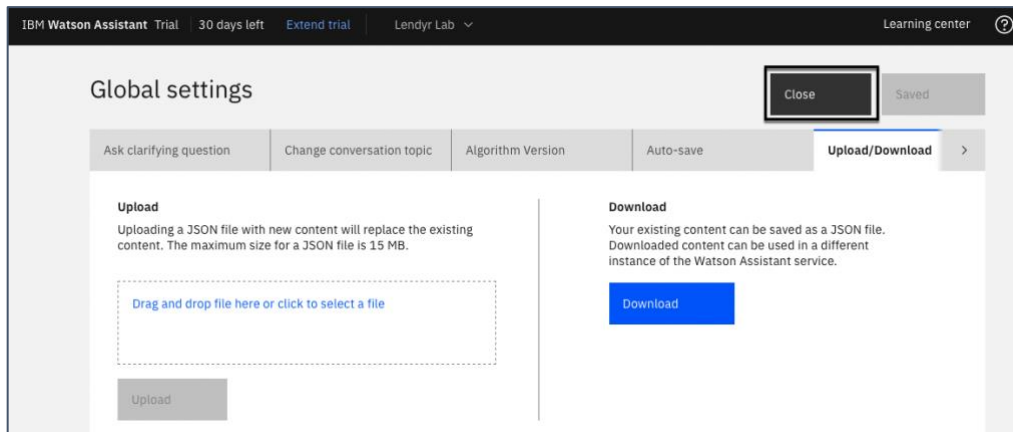
1. Click the **Upload/Download** tab.
2. Download [this json file](#). (*File>Save as* from your browser) and upload it here.
3. Click **Upload**.



On the popup window below, click **Upload and replace**:

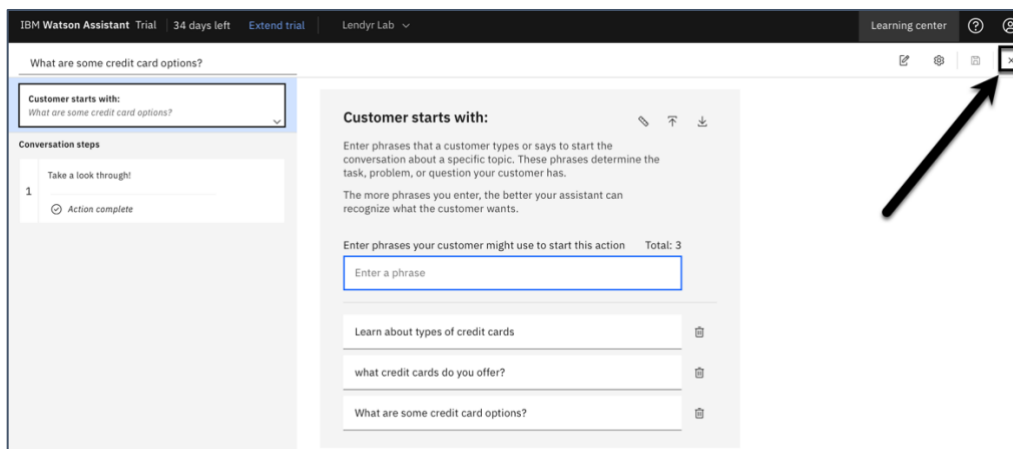


Finally, close the global settings window:



Your assistant is now a copy of the Lendyr.com assistant!

Now, spend [a few minutes](#) exploring the Actions page. You do not need to explore any other part of the product right now. Confused? That's okay! Just click on anything that looks interesting. If you get stuck, look for a **Close** button, like in the image below:



On the Action screen, you can expect to see features such as how the conversation is initiated by the customer, how the assistant may respond to the customer's utterance, and so on.

What features or functionality did you find? Don't worry about using technical terms in your answer; describe them however you'd like.

You may have noticed that the **Product Needs** of our builder persona box above is blank. What does Watson Assistant need to do to satisfy a builder's needs? Try to keep it high-level — we've added a few starting examples.


- Easy, guided onboarding (because they haven't worked with conversational AI before)
- Ability to build without code (because they're non-technical)
- 
- 
- 
- 

Note that the builder's background is not technical. What does this mean for Watson Assistant? Watson Assistant is purposefully designed to be accessible to anyone, whether they have technical skills or not. It is organized around a simple yet powerful conceptual model for conversations. This model makes it easy for non-technical builders to author conversational flows, and it scales well into large and complex use cases.

## Developer's perspective

Let's explore the perspective of a developer. What is their persona like? Read the profile below:

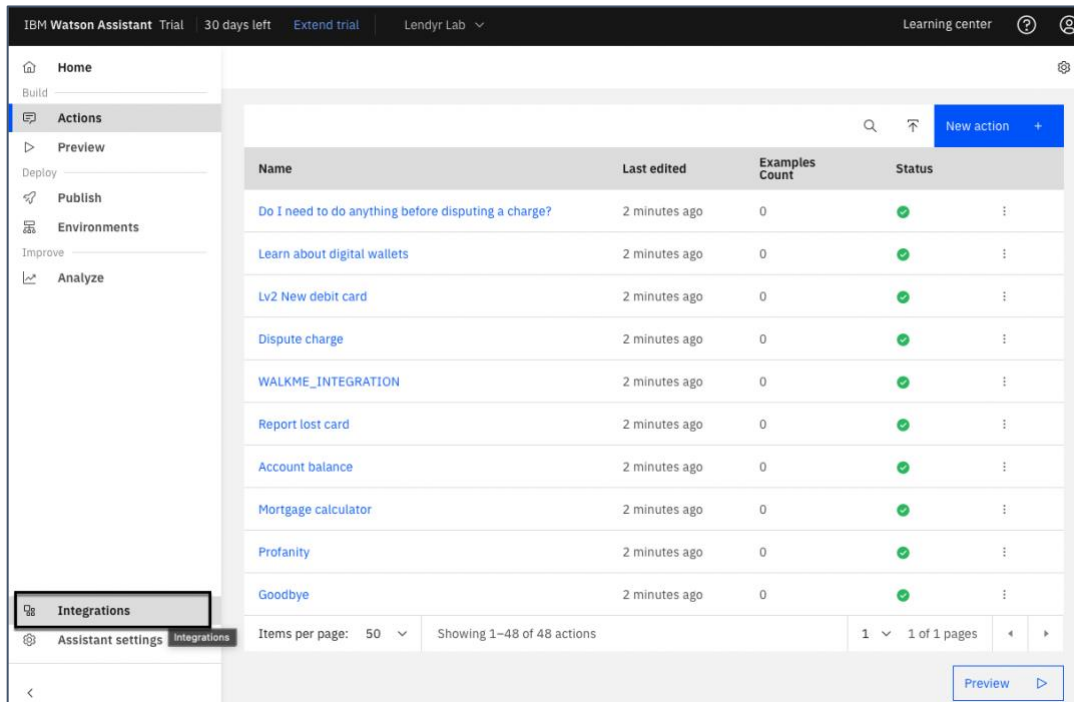
## Developer *Technical*



**Background:**  
Developer, responsible for supporting technical solutions and innovation with a focus on customer care. Likely has a background in or was asked to explore new AI technology, leading into this project.

### Product Needs

Developers can work in the Actions page too, but they often focus on more technical features. From the **Home** page, open the left menu and click **Integrations** on the bottom-left:



Name	Last edited	Examples Count	Status
<a href="#">Do I need to do anything before disputing a charge?</a>	2 minutes ago	0	Success
<a href="#">Learn about digital wallets</a>	2 minutes ago	0	Success
<a href="#">Lv2 New debit card</a>	2 minutes ago	0	Success
<a href="#">Dispute charge</a>	2 minutes ago	0	Success
<a href="#">WALKME_INTEGRATION</a>	2 minutes ago	0	Success
<a href="#">Report lost card</a>	2 minutes ago	0	Success
<a href="#">Account balance</a>	2 minutes ago	0	Success
<a href="#">Mortgage calculator</a>	2 minutes ago	0	Success
<a href="#">Profanity</a>	2 minutes ago	0	Success
<a href="#">Goodbye</a>	2 minutes ago	0	Success

Items per page: 50 Showing 1–48 of 48 actions 1 of 1 pages

Assistant settings Integrations Preview

Watson Assistant Integrations add various channels, extensions, and third-party integrations to easily configure and deploy your assistant. Spend [a few minutes](#) exploring the Integrations page. You do not need to explore any other part of the product right now. Click on anything that looks interesting.

What features or functionality did you identify? Don't worry about using technical terms in your answer; describe them however you'd like.

You may have noticed that the **Product Needs** box is also blank for our developer persona. Brainstorm a few of the developer's needs. Again, keep it high-level — we've added a few starting examples.

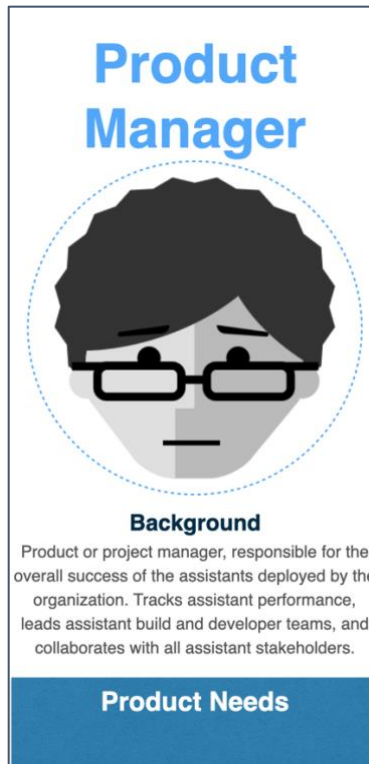
- Easy, guided onboarding (the haven't worked with such an AI technology before)
- Thorough documentation (they'll be navigating APIs and the UI in depth)
- 
- 
- 
- 

Earlier, we noted that developers spend more time on technical features than on the Actions page, where builders create new conversational flows. Why is that? Since Watson Assistant is purposefully designed to make it easy for non-technical builders to author conversational flows, developers can focus in on the parts of a virtual assistant that require their technical expertise, like integrations with other applications.

## Product manager's perspective

Finally, let's explore the perspective of a product manager. What does it mean to manage a virtual assistant product? Read the profile below.



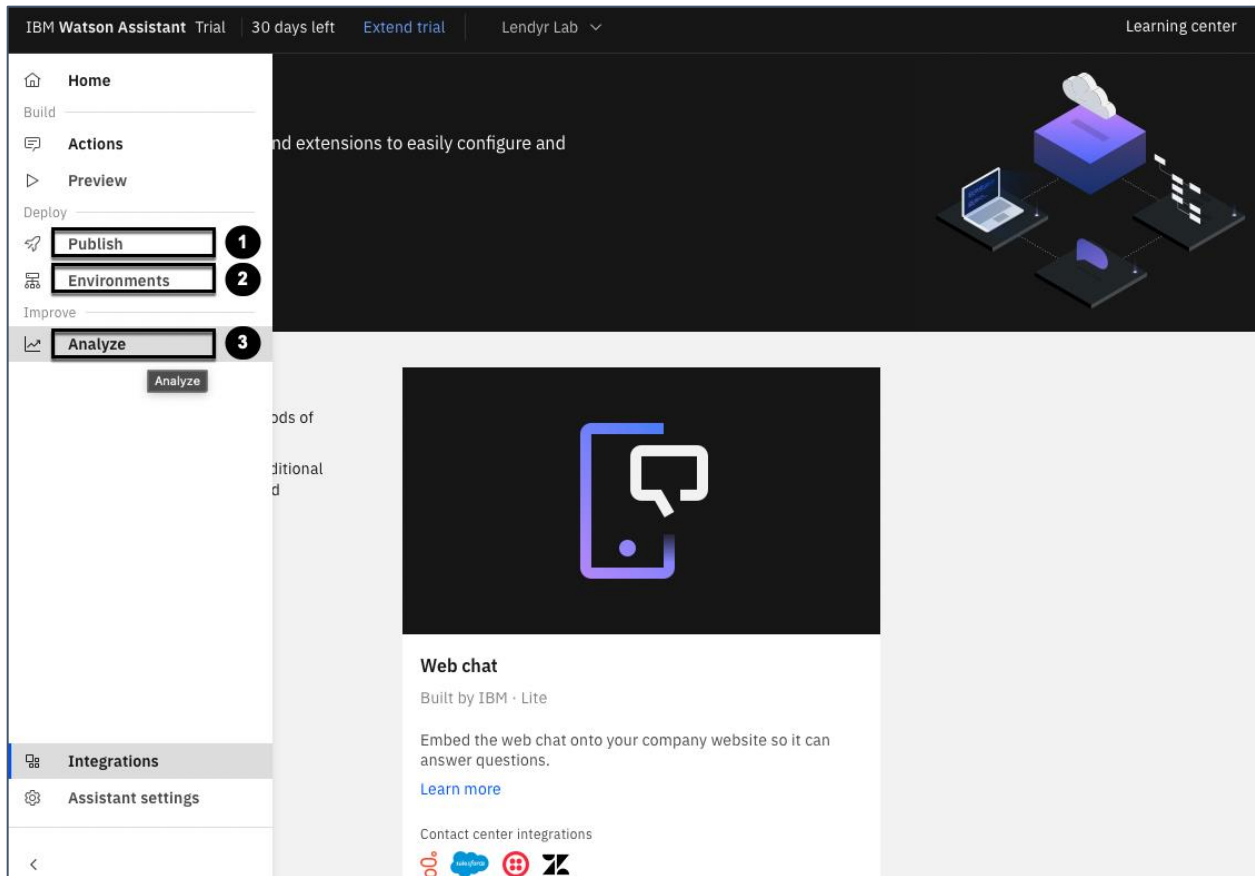


Product managers can work in the Actions and Integrations pages, but they typically focus on overall success, continuous improvement, and expansion. Using the left menu, as shown below, explore the **Publish (1)**, **Environments (2)**, and **Analyze (3)** pages. Click on anything that looks interesting:

**Publishing** is a way to maintain a healthy lifecycle management process. You can create incremental versions of your content over time, making it easier to manage deployment of changes and roll back (revert) to prior versions if necessary.

**Environments** are spaces that contain a version of your content and settings. All assistants come pre-set with a Draft and a Live environment. The Draft environment lets you make changes and test your assistant, while the Live environment holds the current published version.

The **Analyze** page provides a summary of the interactions between users and your assistant. This will give you an in-depth view of what your customers are looking for from your assistant as well as how well your assistant is currently solving their needs.



What features or functionality did you identify? Don't worry about using technical terms in your answer; describe them however you'd like.

The **Product Needs** box is also blank for the product manager. Brainstorm a few of the tasks that the product manager needs to accomplish with Watson Assistant. Keep it high-level — here are some starting examples:

- Performance tracking and reporting tools (they need to be able to tell how well the assistant is doing over time)
- Identity and access management (they might oversee several different teams working on different parts of an assistant)
- 
- 
-

As you explored Watson Assistant through these different personas, you noted that developers spend more time on technical integrations, and builders spend more time on the non-technical authoring experience.

The product manager really likes that Watson Assistant encourages this specialization of labor. Why? Because it's *expensive* to staff a large technical team to maintain a virtual assistant! With Watson Assistant, a product manager can staff a team with both non-technical builders, which focus on conversational flows, and developers, which focus on the technical implementation and integrations. In this way, the product manager can build, maintain, and scale a great solution with a smaller team, driving down their total cost of ownership.

As you learn more about Watson Assistant in this lab, you will also notice that Watson Assistant makes it easy for builders and developers to collaborate. For example, developers can hand off the conversation flow work to builders, who can then build the flows without any code. This removes the dependencies between builders and developers, allowing them to work together *faster*. Teams collaborate more effectively with Watson Assistant, accelerating everyone's time to value.

---

Great work! That concludes this section of the lab. By the end of this lab, you will know how to build a complete virtual assistant, playing each of the roles you just explored to build an assistant just as powerful as the Lendyr Bank assistant!

In the next section, you will learn about the simple but powerful conceptual model Watson Assistant uses to define the fundamental building block of a virtual assistant, as well as how to collaborate on an assistant with colleagues.

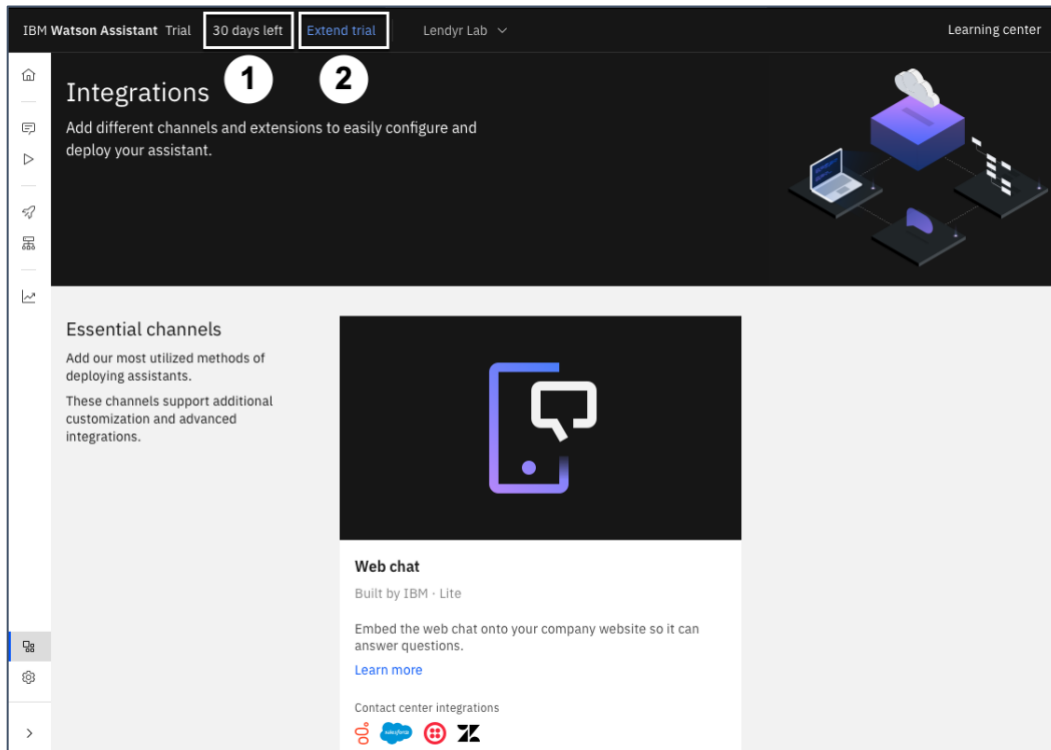
---

## Report an issue

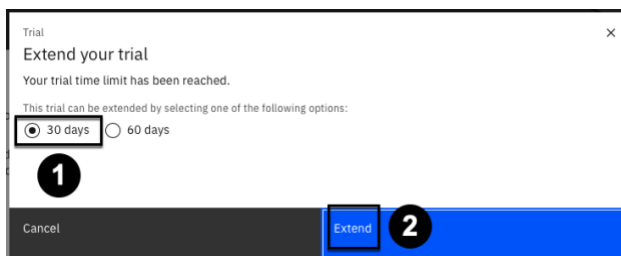
Report an issue, share feedback, or request a change or addition to the hands-on lab [here](#).

# Appendix: How to extend your trial

The remaining trial period is shown at the top of the screen (1), and in the example below, it shows 30 Days remaining. IBMers can extend the period by clicking on **Extend trial** (2):



On the following screen, select the desired length. Note that the example shown is **30 Days** (1). Then, click **Extend** (2):



Note that now the total trial period has been extended by 30 days, to equal 60 days:

