Getting Started With Chatbots, Virtual Assistants and Conversational Platforms
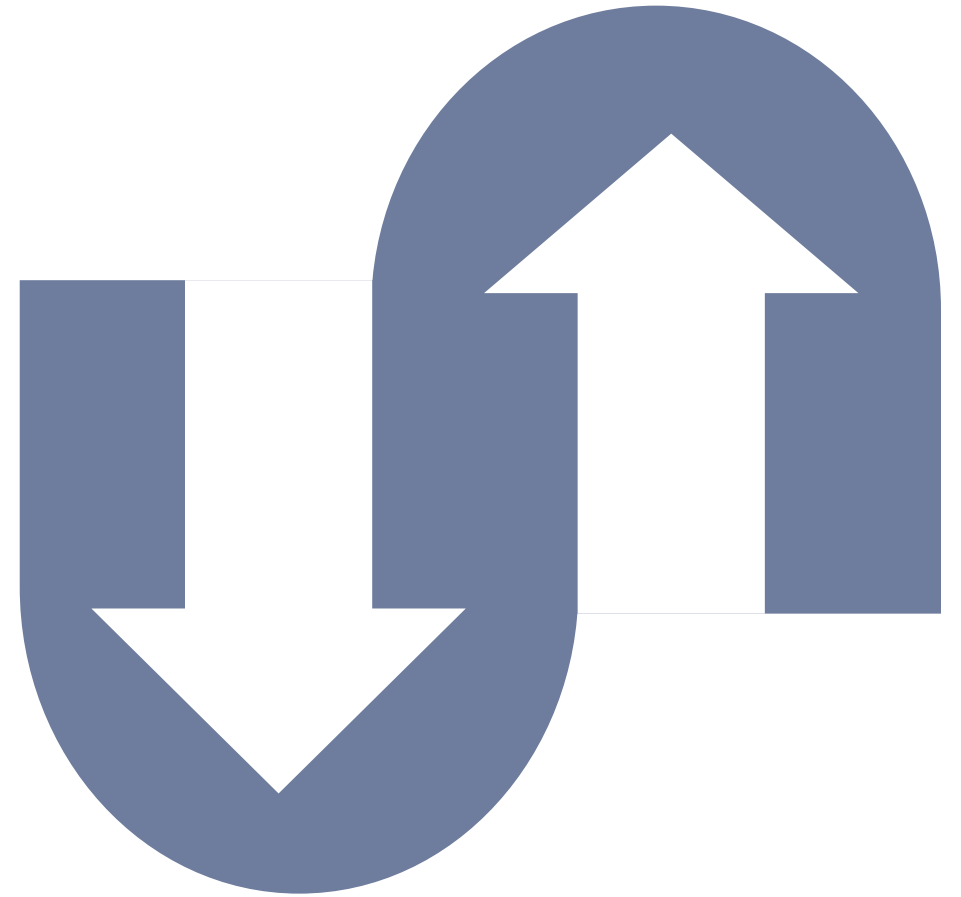
Magnus Revang
@MagnusRevang

AI shifts the burden of learning

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1. What are the use cases?

2. How do I navigate the confusing vendor landscape?

3. How do I get started?

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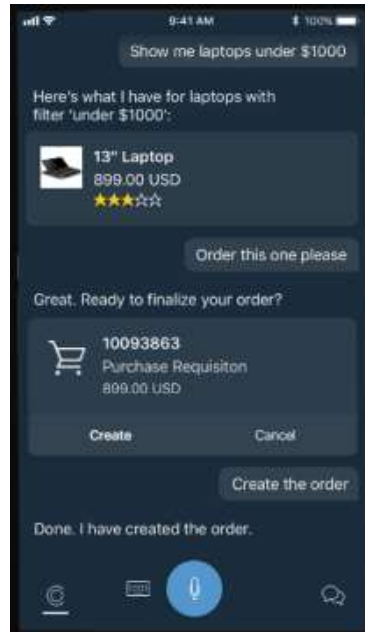
What are the use cases?

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Augmenting Humans

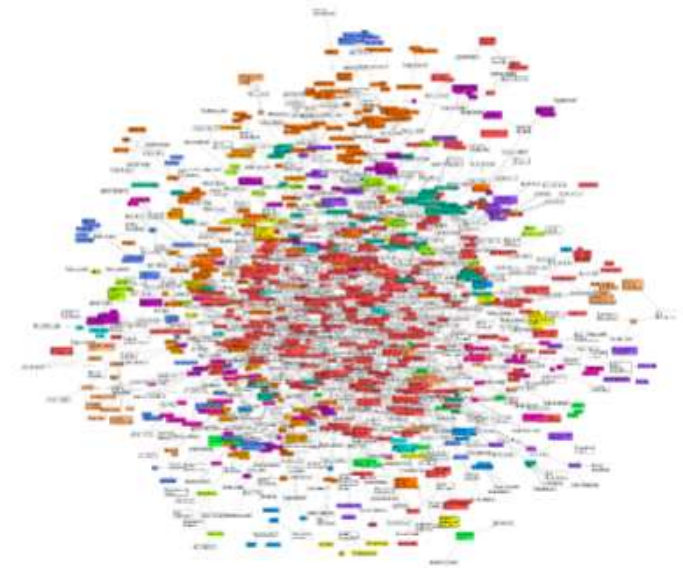## Customer Service, Human Resources and IT Help Desk

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Democratization of Access
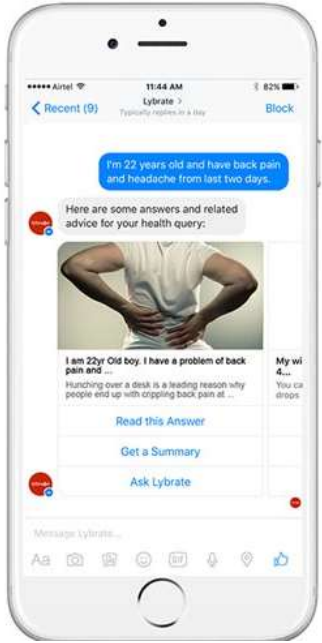

Enterprise Software
Front Ends

Augmented
Analytics

Enterprise
Knowledge

Increasing Productivity, Empowering Employees

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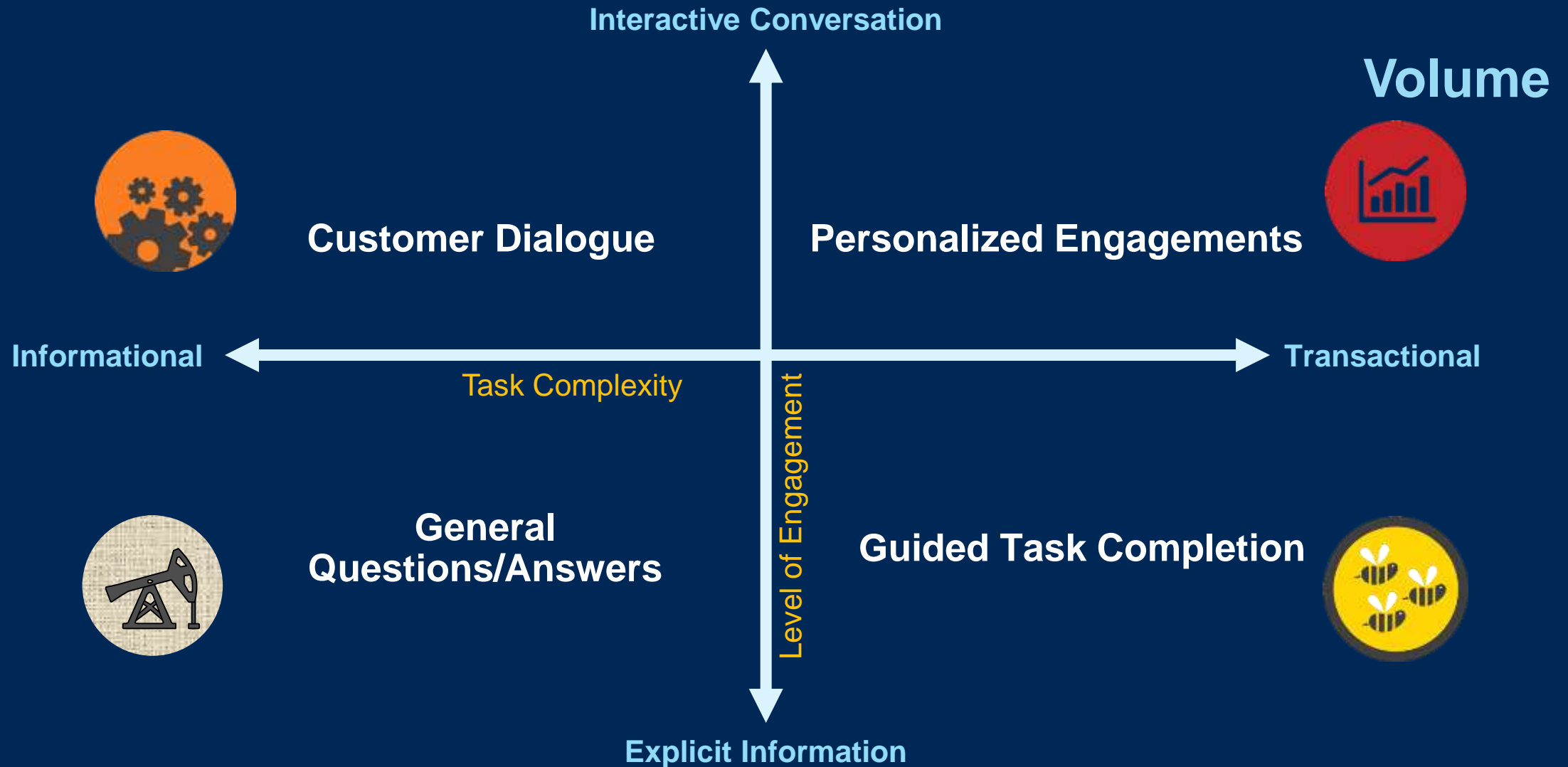# New Channels

Messaging

Virtual Personal Assistants

Voice-Enabled Speakers

New Appliances

Reaching Customers and Employees in New Contexts

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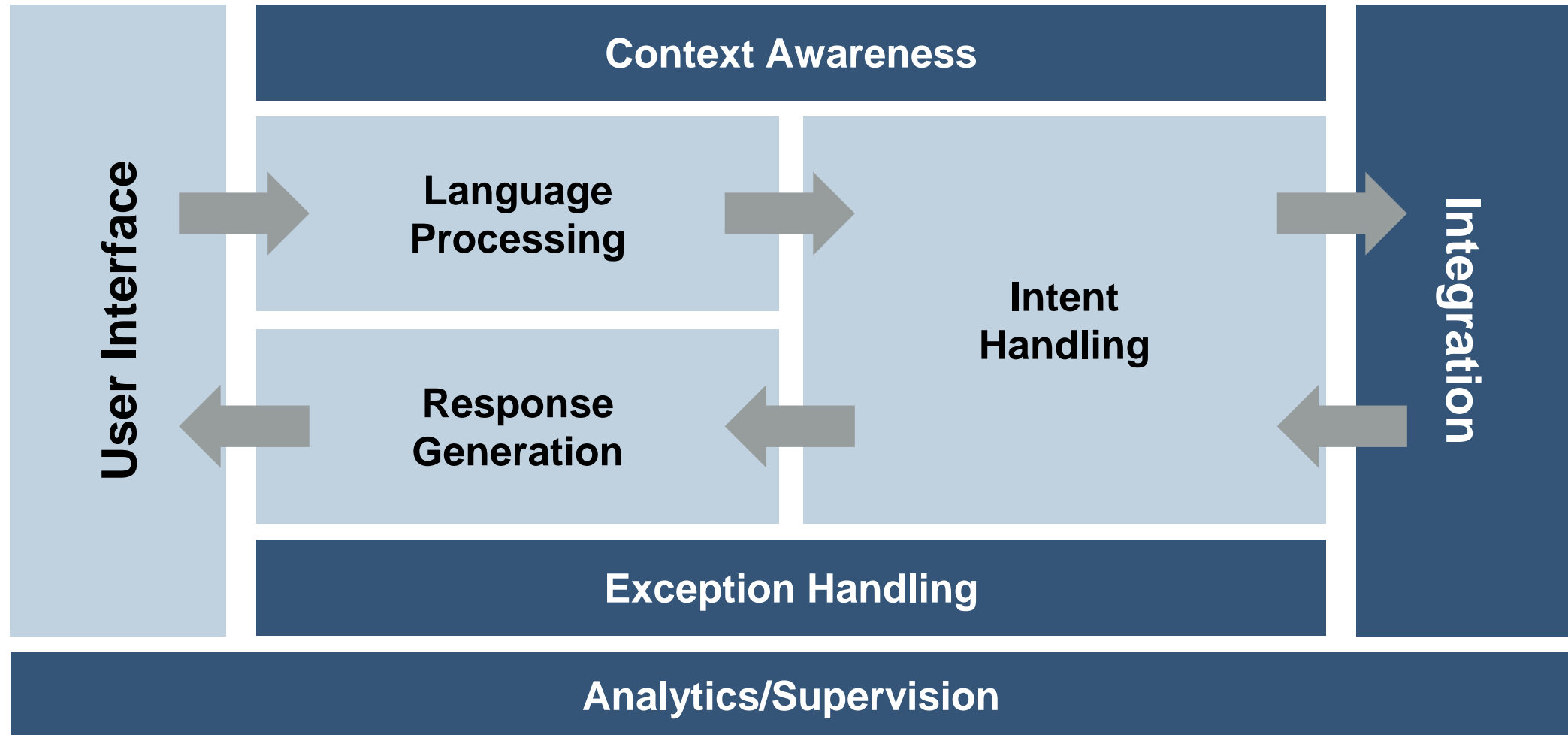# How do I navigate the confusing vendor landscape?

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Use Cases Vary but the Underlying Technology Is the Same

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Development Options

Language Support Is Not a Checkbox!

Dialects, Misspellings, Slang, Vocabulary for Domain, Translation and Feature Compatibility All Matter

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Scalability Matters

Intents, Users,
Locales, Languages,
Use Cases …

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Implementation Is More Important Than Technology

Accuracy and preference by assistant

	Alexa	Hound	Google Assistant	Siri
ACCURACY	50%	74%	59%	77%
PREFERRED	35%	21%	21%	14%

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Quality of Implementation Is More Important Than the Technology Platform Used

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How do I
get started?

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Start Small …

- **Specialized** use case

- **Limited** audience

- **Specialist** user is best

- Informational **or** transactional

- **Limit** need for integration

"A complex system that works is invariably found to have evolved from a simple system that worked. The inverse proposition also appears to be true: a complex system designed from scratch never works and cannot be made to work. You have to start over, beginning with a simple system."

– John Gall, systems theorist

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Design a Personality!
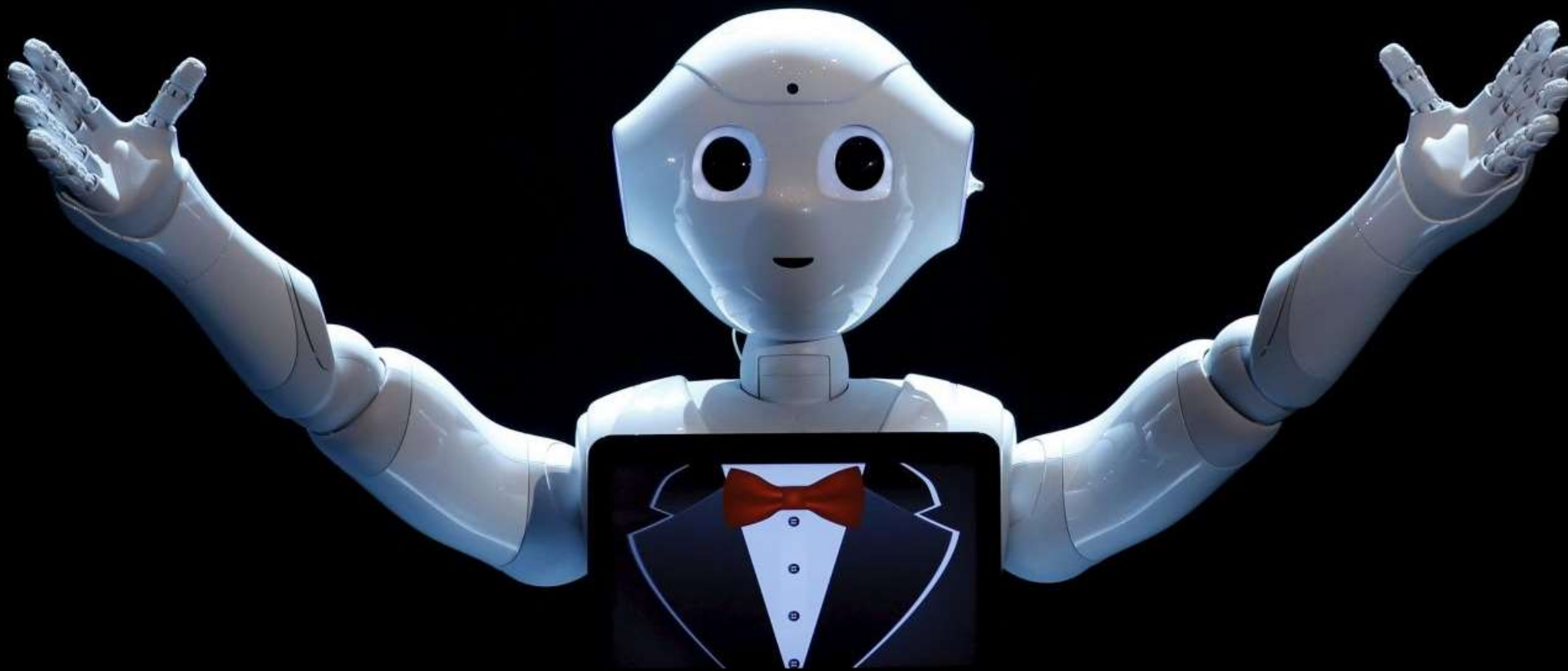
Although … What Kind of Personality Might Change

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Manage the Human Relationship to AI and Robots

Technology as tool
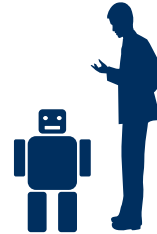
Technology as a subordinate
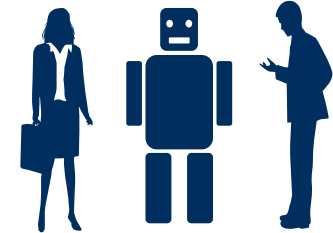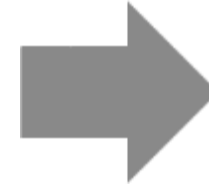
Technology as a social peer

Customer issues
▪ Trust, safety
▪ Attitude to "things" and "intelligence"
▪ Weaker personal relationships

Employee issues
▪ New working practices and skills, deskilling of some roles
▪ Change in field workforce role from "heroes" to "replacers"
▪ Opaque systems and recommendations

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New Skills

Dialogue
Engineer

AI Trainer/
Digital Coach

Humanizer

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Second Wave of Innovation

- Intent Marketplaces

- Networks of Chatbots

- Proactive Chatbots

- Conversations on Your Behalf

- Multimodality ... Towards Algorithmic Interfaces
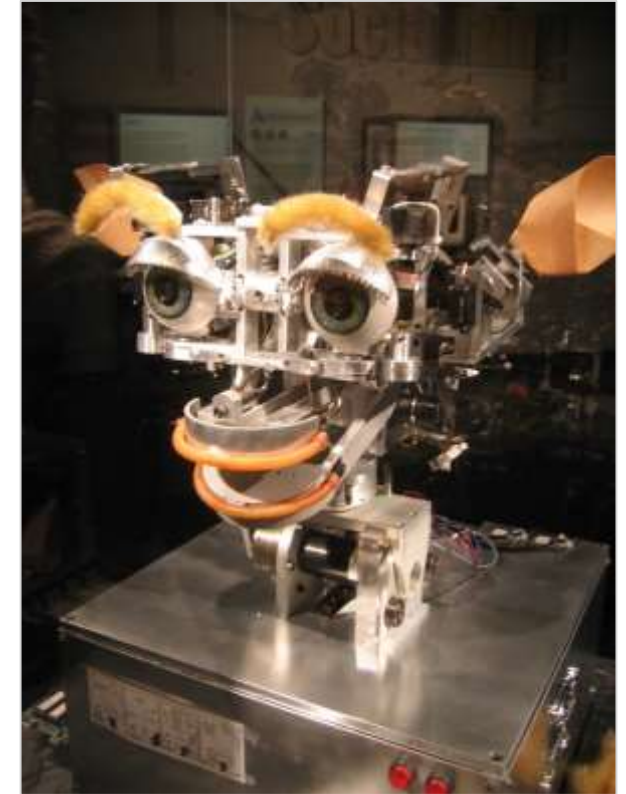
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Recommendations

✓ Choose vendors tactically; you will want to switch in two years

✓ Choose a specialized use case with uniform users, don't go all in

✓ Prepare stakeholders for primary; ROI should be to learn

✓ Assign user experience resources to make a dialogue with personality and cultural nuance

✓ Align chatbot use case with business metrics

✓ Organize it like a product — for continuous improvement and with a permanent team that measures and improves

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Action Plan

Monday Morning (or Friday …):

- Find the use case

Before Christmas:

- Select a vendor based on your short-term needs

1Q19:

- Have a dedicated team build your experimental chatbot

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Recommended Gartner Research

▶ **Four Use Cases for Chatbots in the Enterprise Now**
Van Baker and Magnus Revang (G00316146)

▶ **Architecture of Conversational Platforms**
Magnus Revang, Van Baker and Others (G00371397)

▶ **Market Guide for Conversational Platforms**
Magnus Revang, Van Baker and Others (G00354892)

▶ **Market Guide for Virtual Customer Assistants**
Brian Manusama and Guneet Bharaj (G00321124)

▶ **Seven Decision Points for Success With Virtual Customer Assistants**
Brian Manusama, Frances Karamouzis and Tom Austin (G00299432)

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