Module: Project Scope and Objectives

Activity: Agile Case Study – Chatbot

Input: Design Principles

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| Input Description: | Use these principles to guide your Chatbot design. |

**design principles for chatbots**

**Fail gracefully**

Make sure that if a user does not respond in a way the bot anticipates, the bot does not respond nothing, but instead explains that it did not understand or capture the information. If this happens in the middle of a flow, make sure it does not close the flow with no opportunity for the user to try giving the information again.

**Use buttons and lists sparingly – focus on natural language interactions**

The natural language understanding engines we have today are quite powerful – make full use of them and give the user an experience that is truly conversational, rather than clicking on buttons in a chatbot than on a website. Buttons and lists can be useful in a conversational context, but use them sparingly and anticipate that the user may still type their answer rather than click.

**Surface capabilities to the user, don’t make them guess**

At the beginning of the conversation but also throughout or at the end of a flow, make sure you surface the bot’s main capabilities to the user – don’t make them guess what the bot can and cannot do.

**Remember what the user has said earlier**

Manage context and information contained in previous messages from the user, so you don’t have to ask the user for the same information twice, and to give a truly intelligent conversation experience.

**Allow users to exit flows and then return to where they were, if possible**

Not being able to exit a flow can be an extremely frustrating experience for the user – and ideally, you want to let them return to where they were in the flow they exited, so that they don’t have to start over from scratch.

**Choose whether your chatbot will be proactive or passive**

Choose whether you take control of the conversation and guide the user to a specific goal, or if you let the user control where the conversation is going. Depending on the use case, a bot can be passive and wait for the user to request something or be active and take the user through a specified flow. It can also be both, depending on the stage of the conversation.

**Don’t send users too many messages at once/long messages**

If you choose to send the user multiple messages at once, make sure you don’t overdo it and make sure to keep your messages short. Users will lose interest quickly if they must read paragraphs rather than sentences. You can always point them to other places with more detailed information using links, or you can try to break down the information to make it conversational.

**Don’t assume the user will provide all the information you need in one response**

Even if you asked for it –don’t make the user type very lengthy replies. Users have as little patience for reading long messages as for typing them. Your bot should be able to prompt the user for the information that it is missing intelligently, so as to break it down into bite sized pieces across a back and forth with the user.