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Setting Objectives

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Audience - Who are you building for?

You are embarking on this journey to create a user experience that connects to your desired audience in a relatable and useful way. By defining your primary and secondary audience, you will have a clear frame of mind when building the bot's content as well as designing your launch strategy.

Success Story - What is your best-case scenario?

The difference between a basic or spammy chatbot and a strategic tool is value. It is important to define the high-level value you are looking to deliver to your customer or your internal team.

Performance – What are your KPIs?

At this stage you need to quantify your success stories. How will you know if your chatbot is delivering strategic value? How will you identify its strengths and weaknesses?

tunl.chat **Example Success Stories**

Overloaded agents

Limited hours

Inability to scale feedback

Millennials and Gen Y

More efficient customer support

- Member wait time has decreased in the call centre.
- Self-service rate is rising – members are able to solve their issues independently.
- Call centre calls are decreasing, chatbot hits are increasing.

24/7 Support

- Customer satisfaction is rising.
- Member support is starting the day with less emails in the queue.
- Better crisis management.

Easily identify opportunities

- Marketing is reviewing the conversations with chatters and improving communication channels
- Feedback is flowing- a member can easily log a good or bad experience

Acquisition and Retention

- Increased account openings among this demographic
- Student accounts evolving to engaged "adult" accounts
- Spike in credit card, loan applications

tunl.chat Example Performance

Overloaded agents

Limited hours

Inability to scale feedback

Millennials and Gen Y

More efficient customer support

- Call centre wait time
- Containment rate - The percentage of engaged conversations that did not result in a handoff to a human agent.
- Number of chatbot conversations

24/7 Support

- CSAT – More detailed feedback from a user on their chatbot experience
- Engagement Rate - The percentage of conversations where a chatter moves past the greeting.
- Feedback Rate -   Shows the feedback your customers have given your answers via thumbs up/thumbs down

Easily identify opportunities

- Increase in the use of the Positive/Negative feedback loop
- Number of edits to your website
- Number of complaints during an outage

Acquisition and Retention

- Sales performance:
  - New account openings, student loan issuance, other loans, credit cards, in-branch appointments.