

tunl.chat
Standard Flow Library

Chatbot Flows

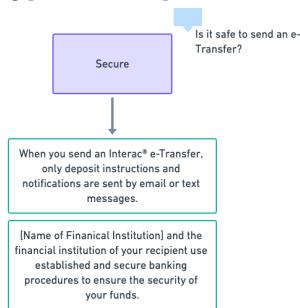
What is a Chatbot Flow?

A flow is a set of inter-related answers about a specific theme, topic or intent.

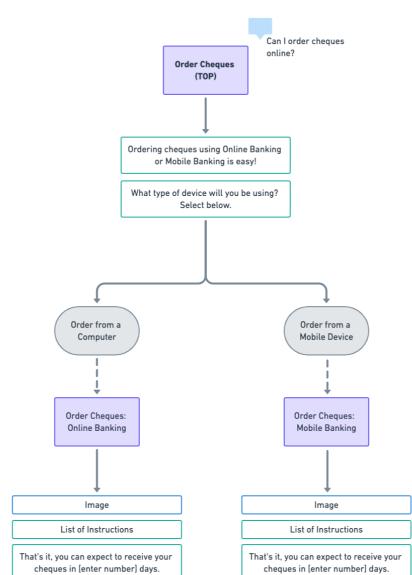
Are there different types of Chatbot Flows?

Yes, Chatbot Flows can be complex or simple. It depends on the specificity of the chatter's question and the answer(s) available.

Type 1: Simple Q&A



Type 2: Decision Tree



What is a Decision Tree?

Decision trees are the different ways you can structure content to guide the chatter through a conversational journey.

Any response from the bot that includes more than one answer per chatter question, is considered a type of Decision Tree. There are different components, that are described below.

Component

Description

Answer Card

Individual answers delivered to the chatter. In the Ada Dashboard these are represented as cards for easy organization.

Quick Reply (QR)

Act as links that trigger other Answer Cards in the bot if selected. When multiple QR options are presented to the chatter, the title of the QR button that they select becomes their question, and the other buttons disappear.

Understanding Chatbot Flows

How do I quantify a flow?

A chatbot flow is a maximum of eight (8) answer cards. Therefore, when quantifying a larger structure, we can assume:

- 1-8 answers cards equates to 1 chatbot flow
- 9-16 answer cards equates to 2 chatbot flows
- 17-24 answer cards equates to 3 chatbot flows etc.

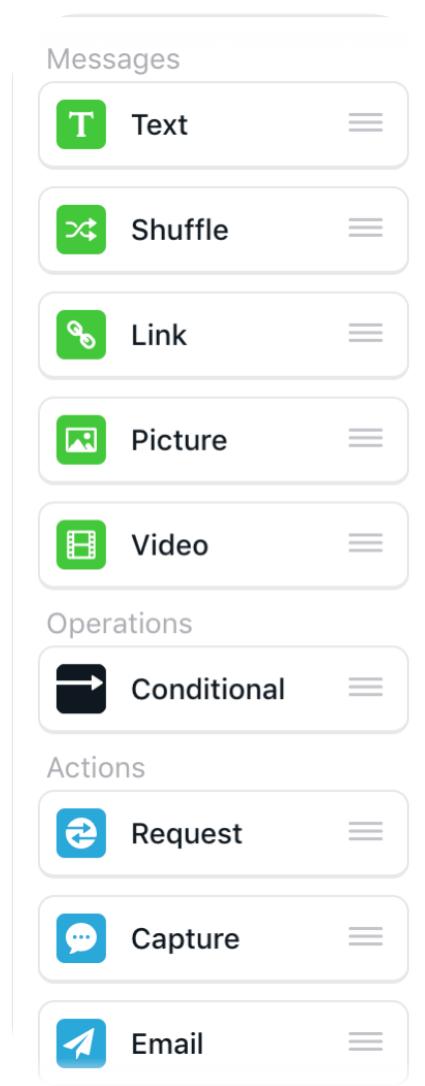
Answer cards are only counted if they are not pre-existing. Quick replies, conditionals, and redirects used to connect to pre-existing answer cards will not be included in the answer card count.

What types of contents blocks are available in chatbot flows?

The content blocks available within your bot will vary based on your package. That being said, the Standard Flow library only uses the base content blocks available to all financial institutions:

- | | | | |
|-----------|-----------|----------------|---------------|
| • Text | • Picture | • Email | • Conditional |
| • Shuffle | • Video | • Web | • Redirect |
| • Link | • Capture | • Satisfaction | • Request |

There are instances in the Standard Flow library and in your Custom Flows where the Request block can be used to leverage existing APIs within your organization. The use of these APIs are contingent on their availability and level of complexity.



Backlog Approach

A healthy approach to managing content!

There is going to be areas of content that are not included in the initial scope of your chatbot. That is okay! Our goal is to give you a foundation that is easy to build on top of. Throughout the project there we recommend you follow this approach when a question of piece of content arises that is not included in scope.

1. How often do we think a chatter will ask this question?
2. Is it a broad topic or intent or is very nuanced and specific?
3. Can the find the information elsewhere on our website?

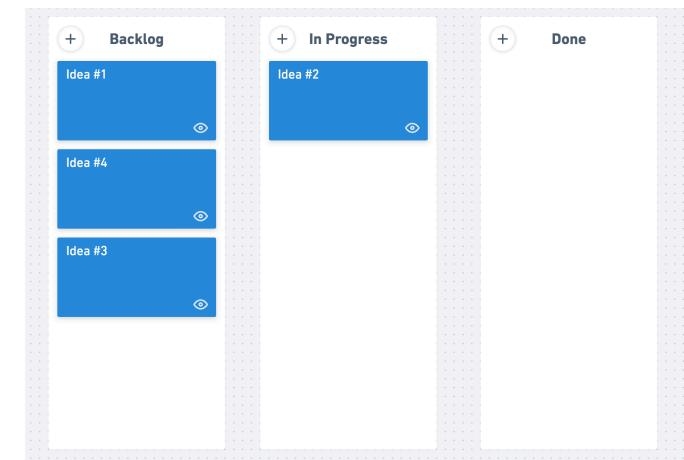
If the topic is frequently asked, broad, or the answer is on your website:



Use the Backlog Template Answer Card to build a placeholder flow.

(You should only make a few of these)

If the content is rarely asked, specific, and requires staff intervention:

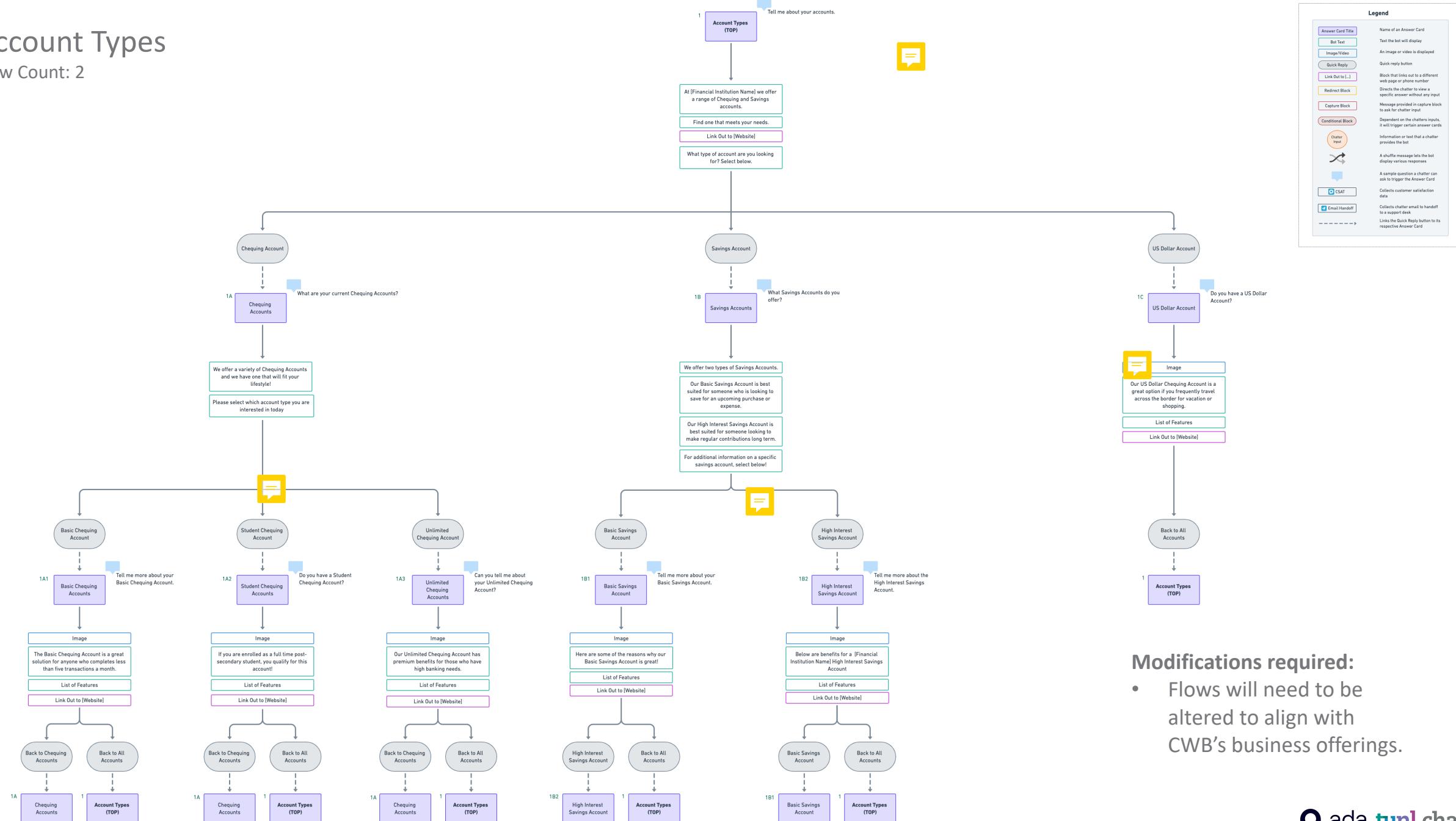


Put it in a Backlog Spreadsheet and build after go live!

Accounts

Account Types

Flow Count: 2

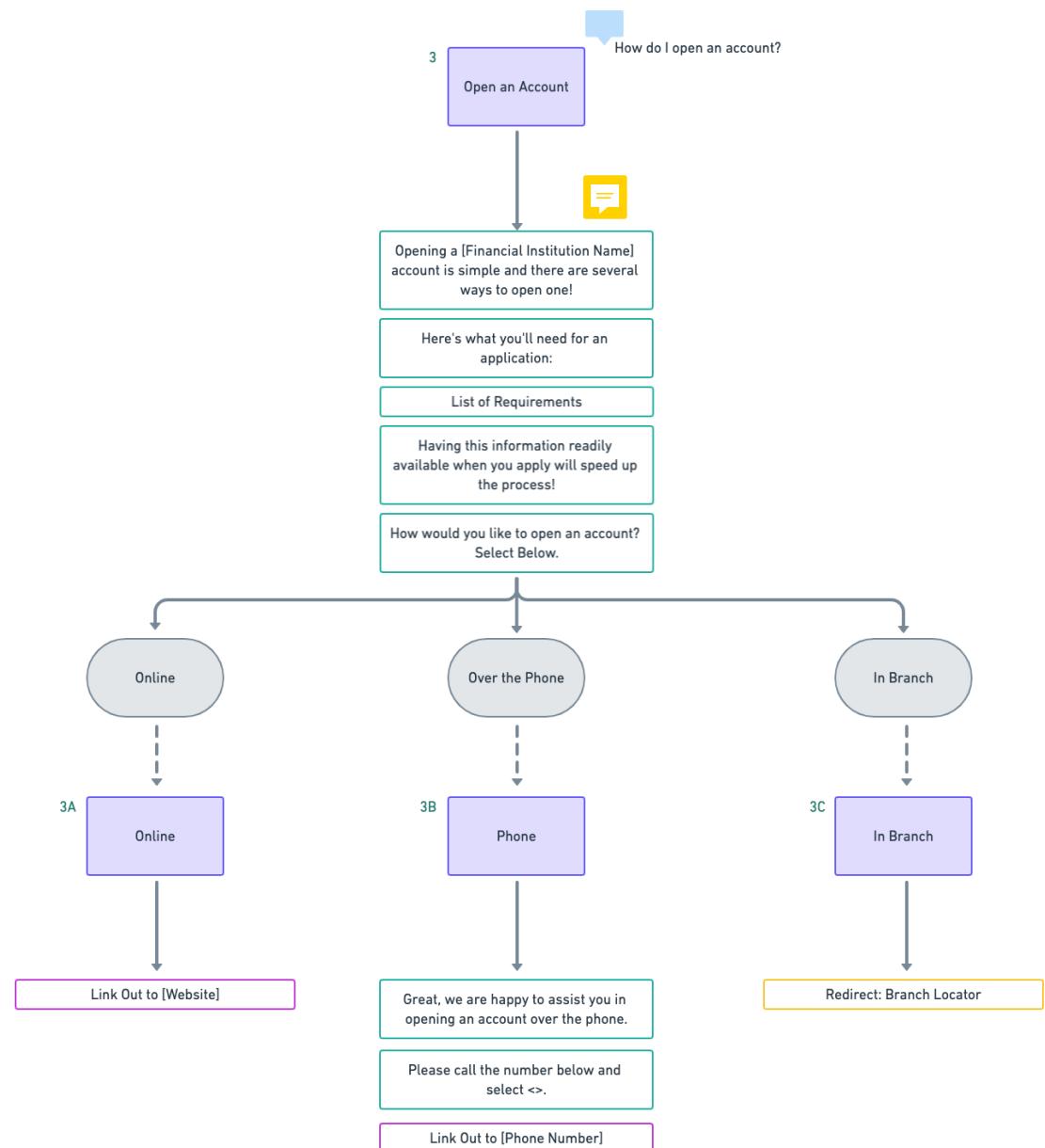


Modifications required:

- Flows will need to be altered to align with CWB's business offerings.

Opening an Account

Flow Count: 1



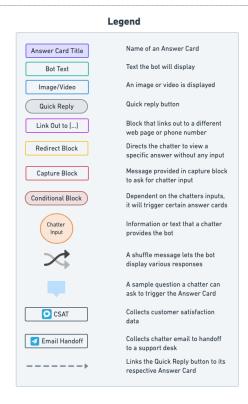
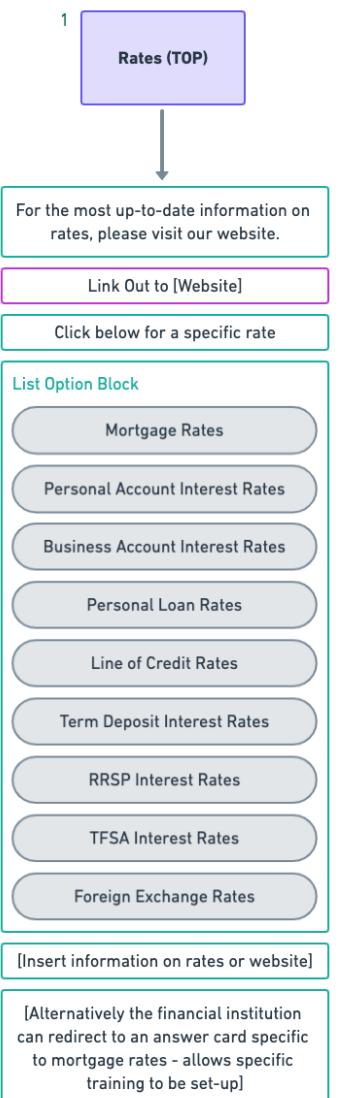
Legend	
Answer Card Title	Name of an Answer Card
Bot Text	Text the bot will display
Image/Video	An image or video is displayed
Quick Reply	Quick reply button
Link Out to []	Block that links out to a different web page or phone number
Redirect Block	Directs the chatter to view a specific page or input any input
Capture Block	Message provided in capture block to ask for chatter input.
Conditional Block	Depended on the chatter inputs, it will trigger certain answer cards
Shuffle Input	Information or text that a chatter provides the bot
A shuffle message lets the bot display various responses	A sample question a chatter can ask to trigger the Answer Card
CSAT	Collects customer satisfaction data
Email Handoff	Collects chatter email to handoff to a support desk
-----	Links the Quick Reply button to its respective Answer Card

Modifications required:

- This will be altered to only have an option for email hand-off which will feed into the Lead Generation for Ashley's team. They will receive a full transcript and can follow-up through existing process.

Rates

Flow Count: 1



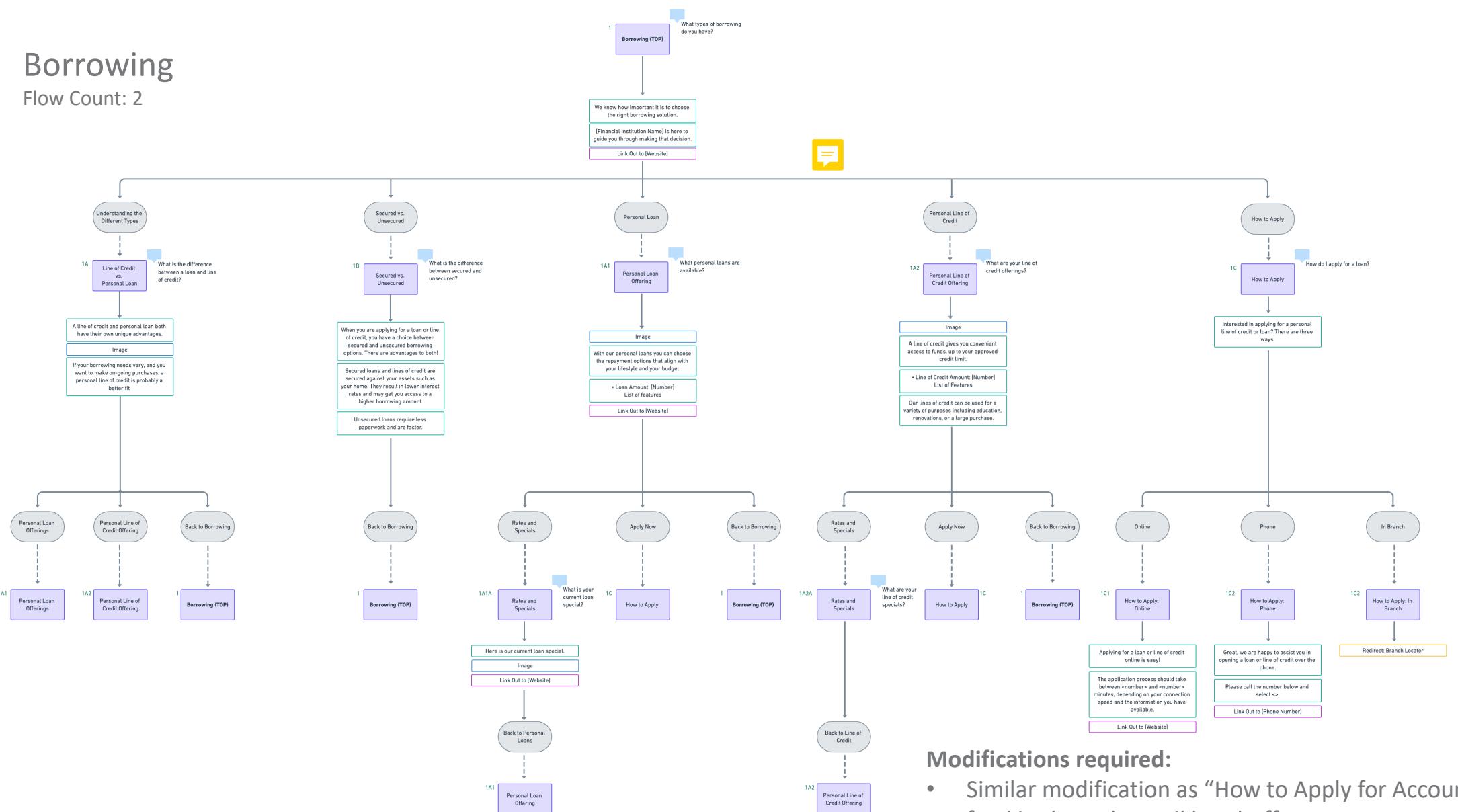
Modifications required:

- Only list rates relevant to business customers. The flow will point the user to the website.

Borrowing

Borrowing

Flow Count: 2



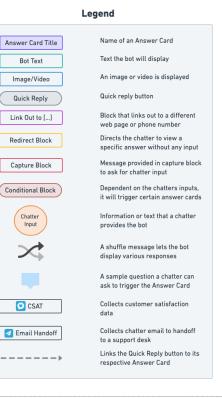
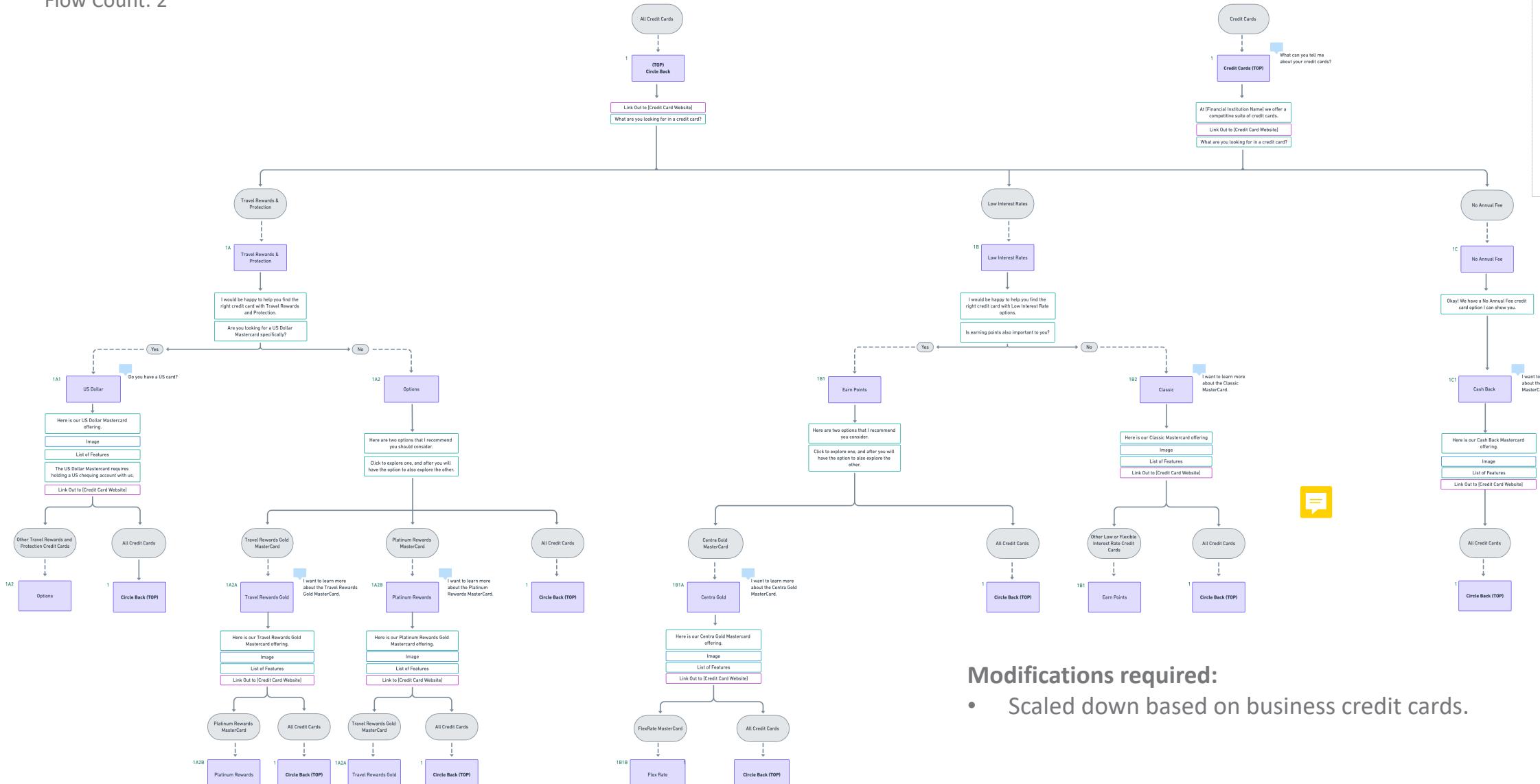
Modifications required:

- Similar modification as “How to Apply for Account” - feed in through email hand-off.
 - Content will need to pivoted to make sense for business lending vs. personal. Are there more relevant subtopics than what is listed?



Credit Cards

Flow Count: 2

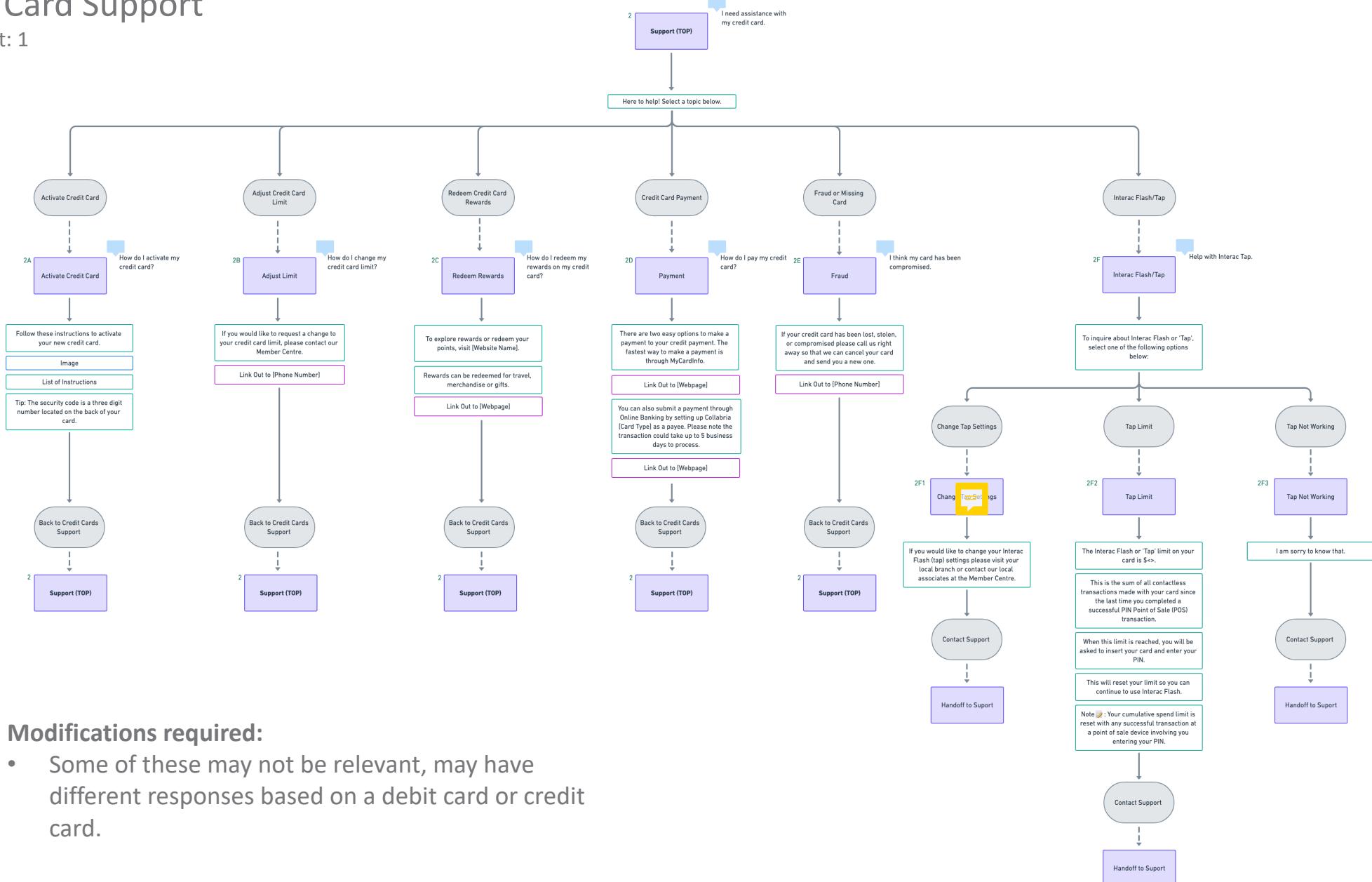


Modifications required:

- Scaled down based on business credit cards.

Credit Card Support

Flow Count: 1



Legend

Answer Card Title	Name of an Answer Card
Bot Text	Text the bot will display
Image/Video	An image or video is displayed
Quick Reply	Quick reply button
Link Out to []	Block that links out to a different web page or phone number
Redirect Block	Directs the chatter to view a specific page or input
Capture Block	Message provided in capture block to ask for chatter input
Conditional Block	Depended on the chatter inputs, it will trigger certain answer cards
Shuttle Input	Information or text that a chatter provides the bot
A sample question a chatter can ask to trigger the Answer Card	A shuffle message lets the bot display various responses
CSAT	Collects customer satisfaction data
Email Handoff	Collects chatter email to handoff to a support desk
---	Links the Quick Reply button to its respective Answer Card

Modifications required:

- Some of these may not be relevant, may have different responses based on a debit card or credit card.

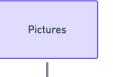
General Flows

Pre-Trained

Flow Count: 0



Note: This pre-trained flow is only relevant for subscribers of Ada Glass.



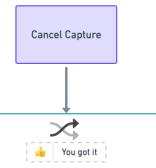
Note: This pre-trained flow is only relevant for subscribers of Ada Glass.



Note: This pre-trained flow is used when a chatter sends the bot a web link.



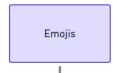
Sorry, I don't quite understand that. I'm still learning.
 I'll send your question to our support team.
 Hmm... Can you rephrase that question for me one last time?
 Sorry I don't understand your question or I am not trained on that topic.
 I am going to hand you off to our Support Team.



Note: This pre-trained flow is used when we're asking for something during a capture and the chatter decides not to answer.



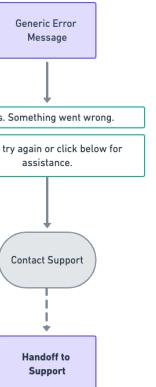
Note: This pre-trained flow is used offers the chatter a choice between several Answer when the bot isn't confident which is best.



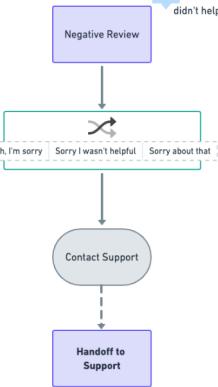
Note: This pre-trained flow is used when a chatter sends an emoji.



Note: This pre-trained flow is used whenever the bot does not understand the chatter's input. It encourages the chatter to try a couple of times before handing off to support.



Note: This pre-trained flow is a generic error message to be used as a template in conditional flows.



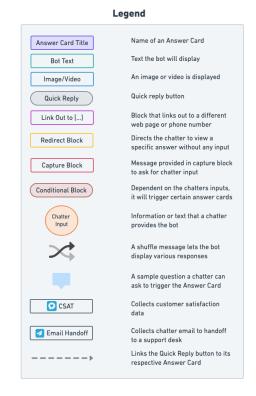
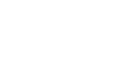
Note: This pre-trained flow is used whenever a chatter negatively reacts to an answer delivered with either a 'thumbs down' or a message such as 'not helpful'.



Please give our Support Team a call at the phone number below.
 Link Out to [Phone Number]
 Email Handoff
 If you have the time, please provide feedback on your experience with me today.
 CSAT



Note: This pre-trained flow is used whenever someone needs help from your human support team. This answer will capture someone's email and create a ticket in your help desk.
 Note: This pre-trained flow is used whenever a chatter positively reinforces an answer delivered with either a 'thumbs up' or a message such as 'thank you'.

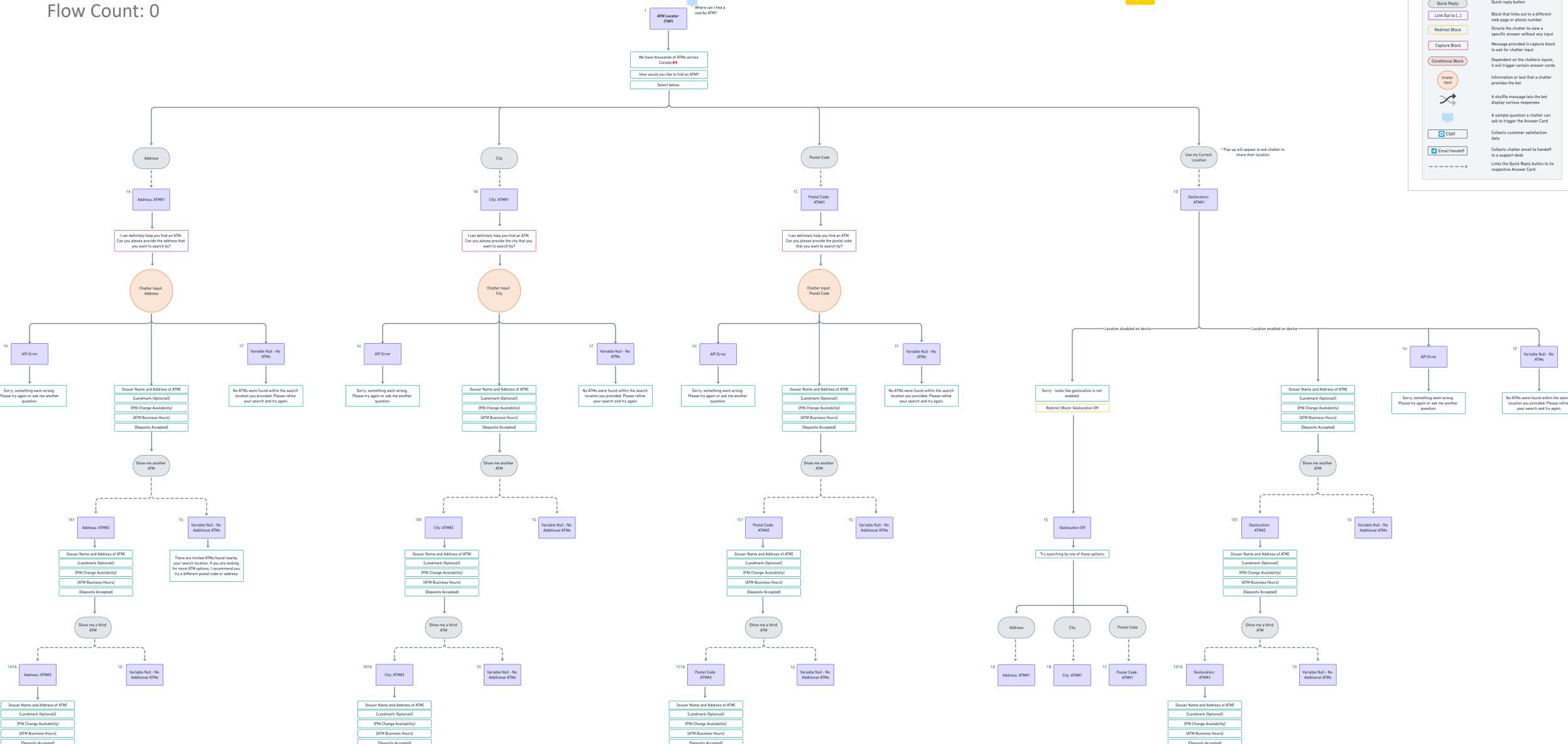
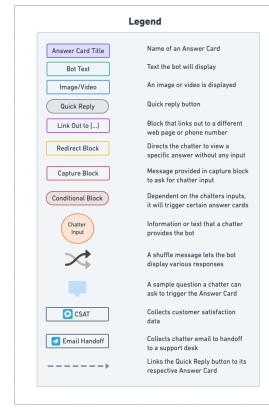


ATM Locator

Flow Count: 0

Modifications required:

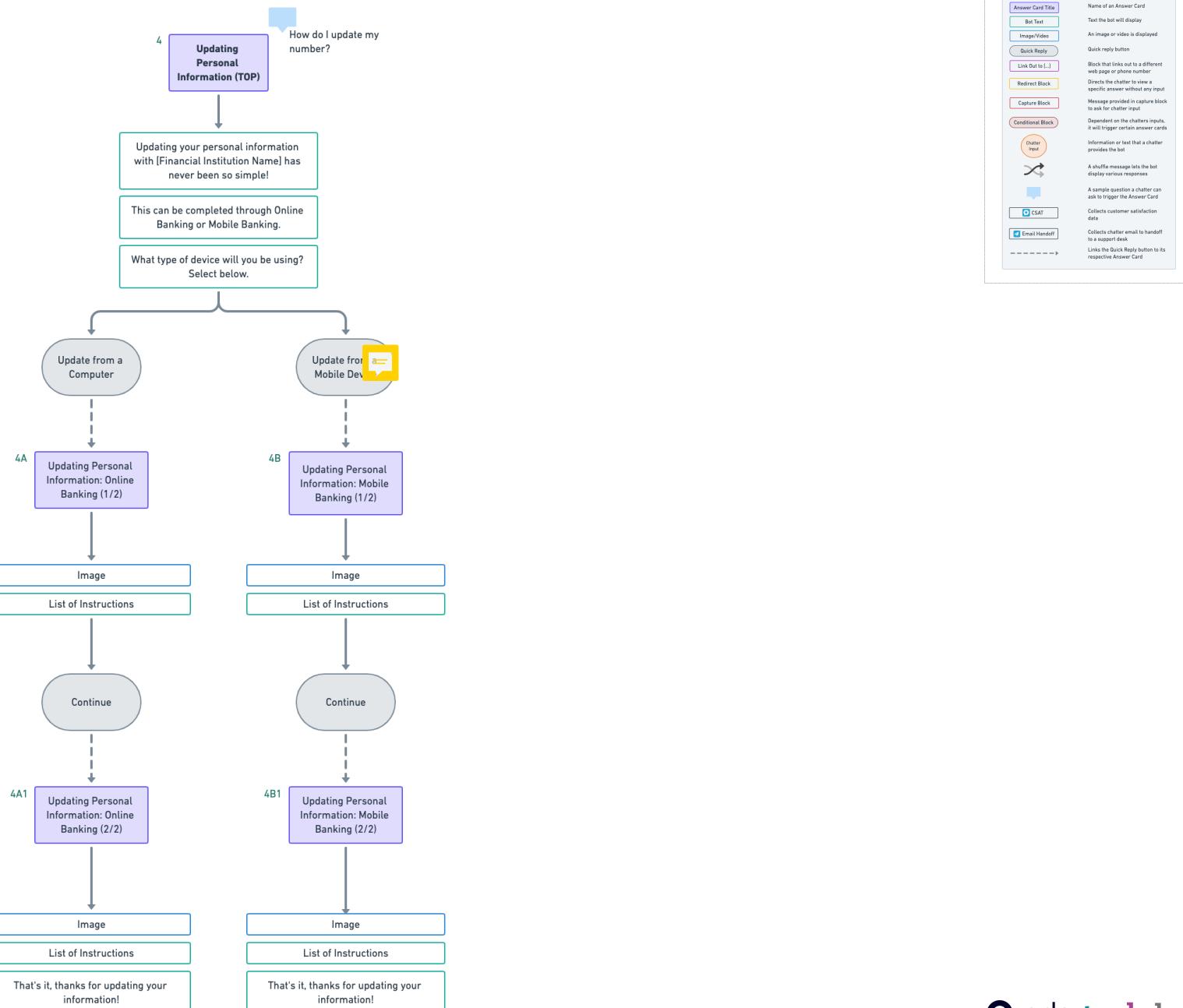
- Do you have an API for your branches?



Digital Banking

Updating Personal Information

Flow Count: 1

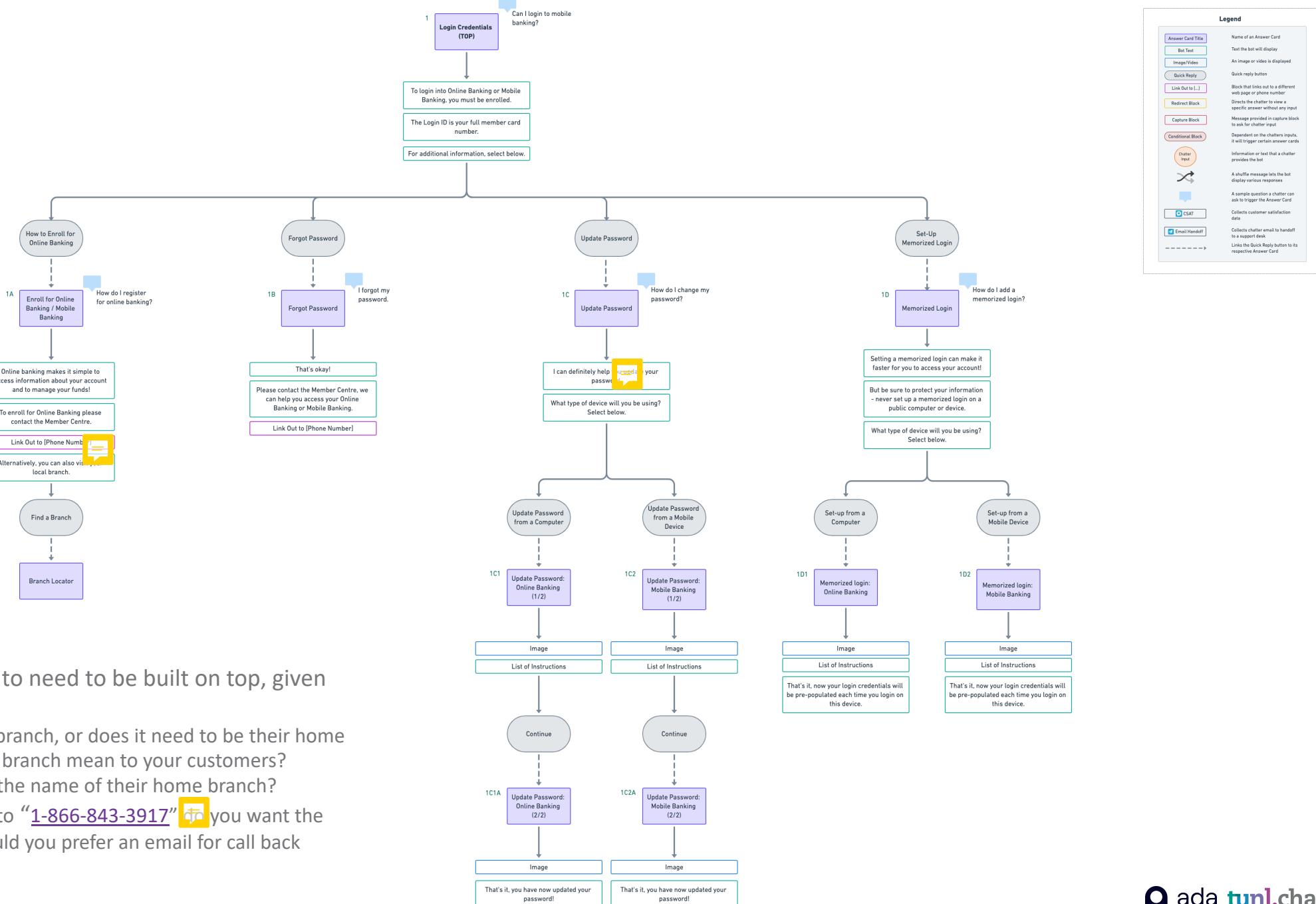


Modifications required:

- Can this be done through online banking today?

Digital Banking Login

Flow Count: 2

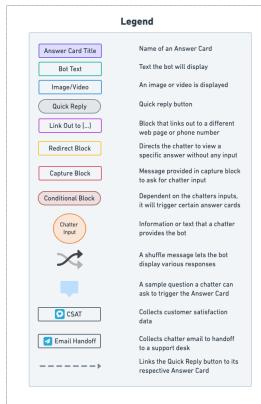
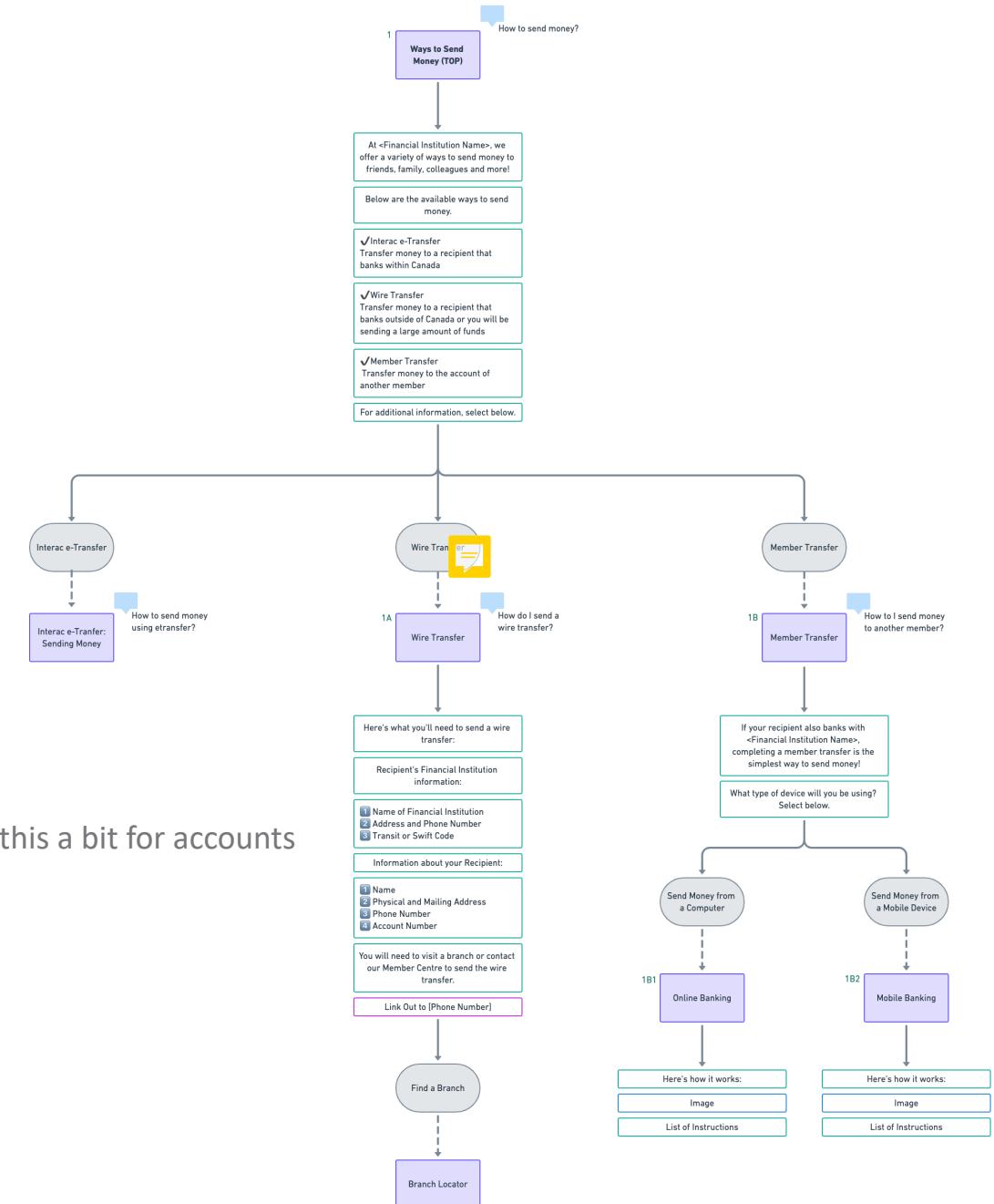


Modifications required:

- Forgot my password is going to need to be built on top, given there is not a call centre.
 - Can a cardholder call any branch, or does it need to be their home branch? What does home branch mean to your customers?
 - Do people typically know the name of their home branch?
 - What is this number lead to “[1-866-843-3917](tel:1-866-843-3917)” do you want the bot passing to this, or would you prefer an email for call back tomorrow?

Send Money Options

Flow Count: 1

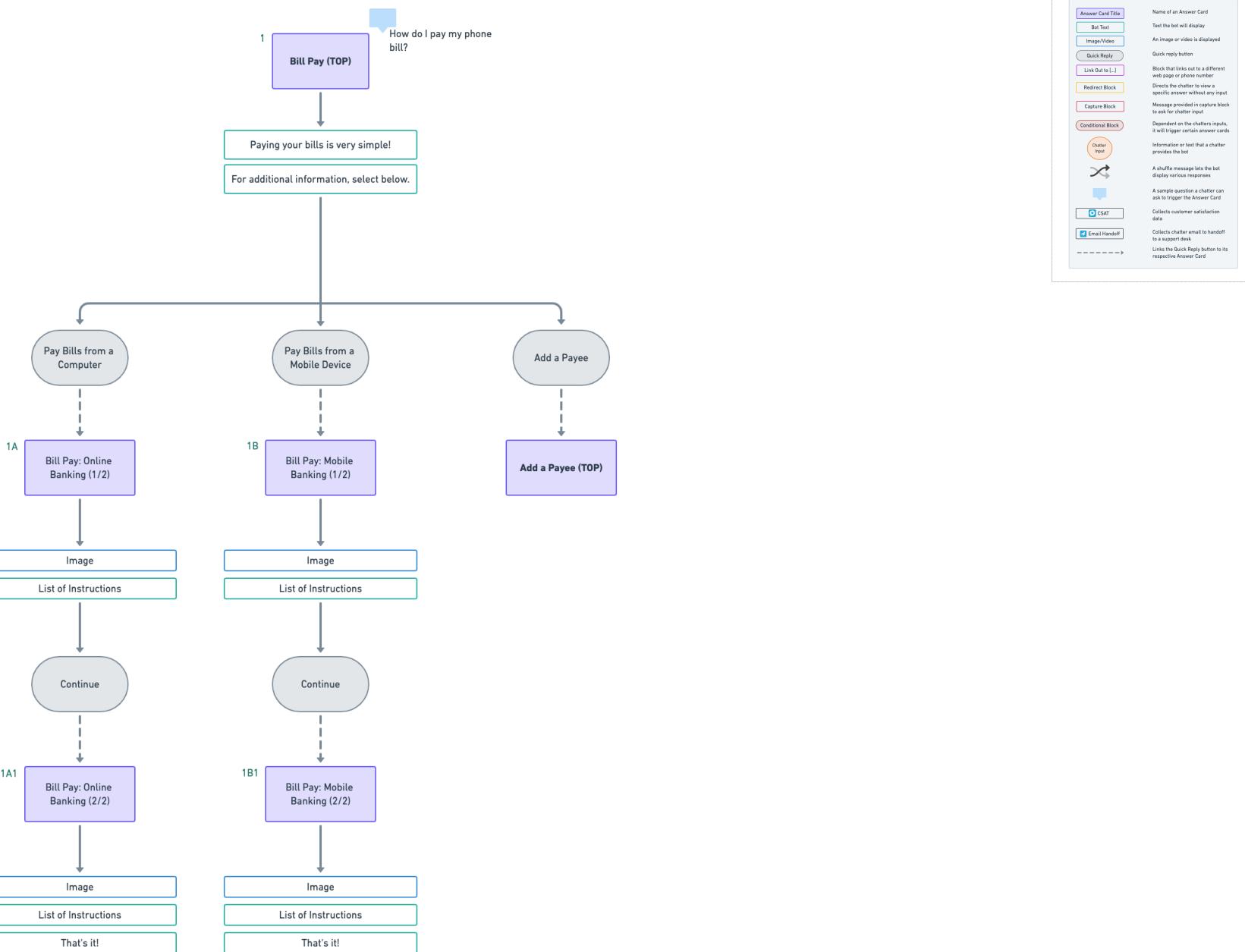


Modifications required:

- Like bill payment, me want to extrapolate this a bit for accounts receivable services.

Bill Pay

Flow Count: 1

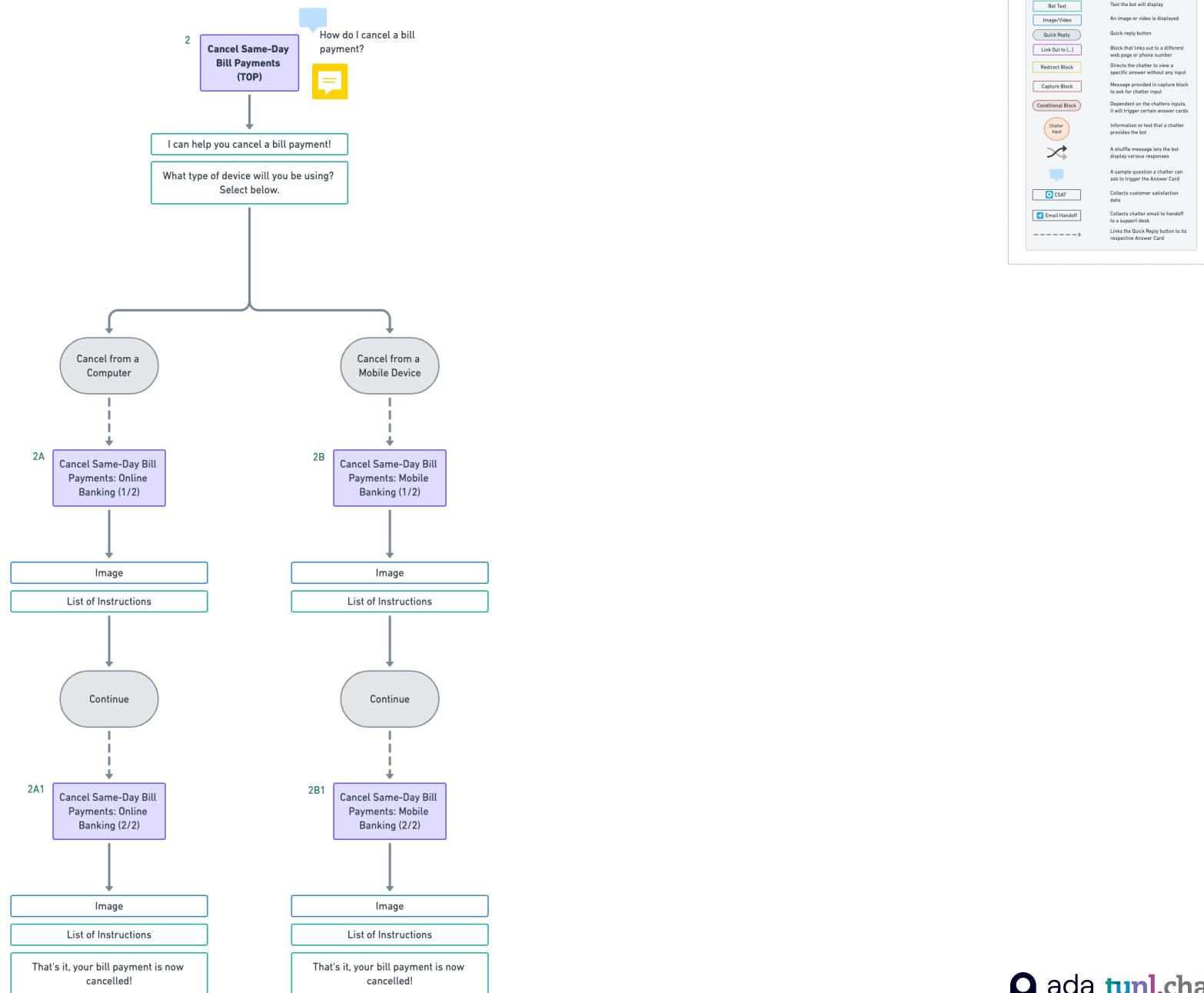


Modifications required:

- Are the businesses paying bills through our day-to-day accounts? Are they struggling? Do we need to broaden this to explain the different options?
- It sounds like we need to be combining this flow with the Send Money flow and broadening it for Accounts Payable options.

Cancel Same-Day Bill Payment

Flow Count: 1

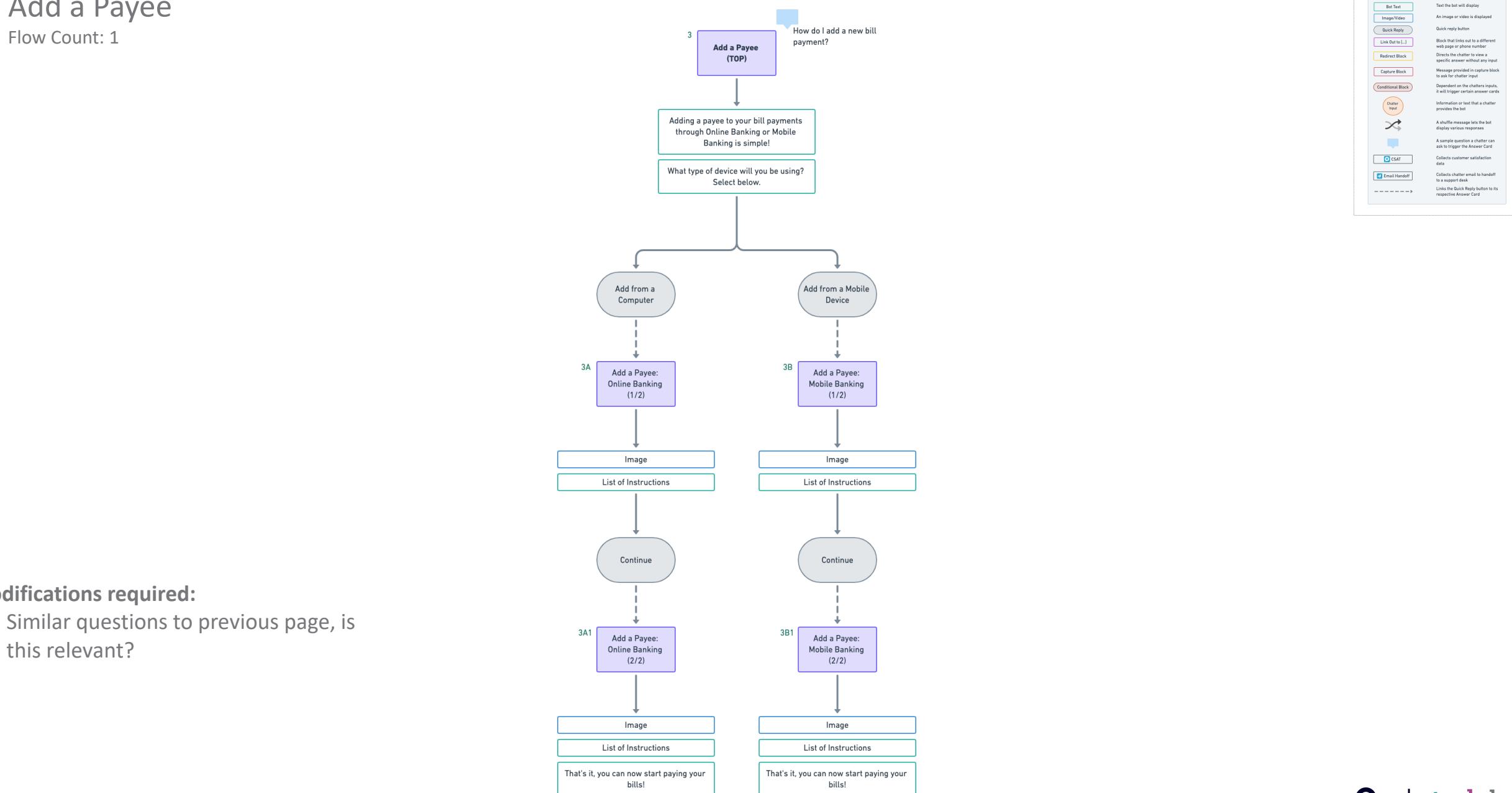


Modifications required:

- Similar questions to previous page, is this relevant?

Add a Payee

Flow Count: 1



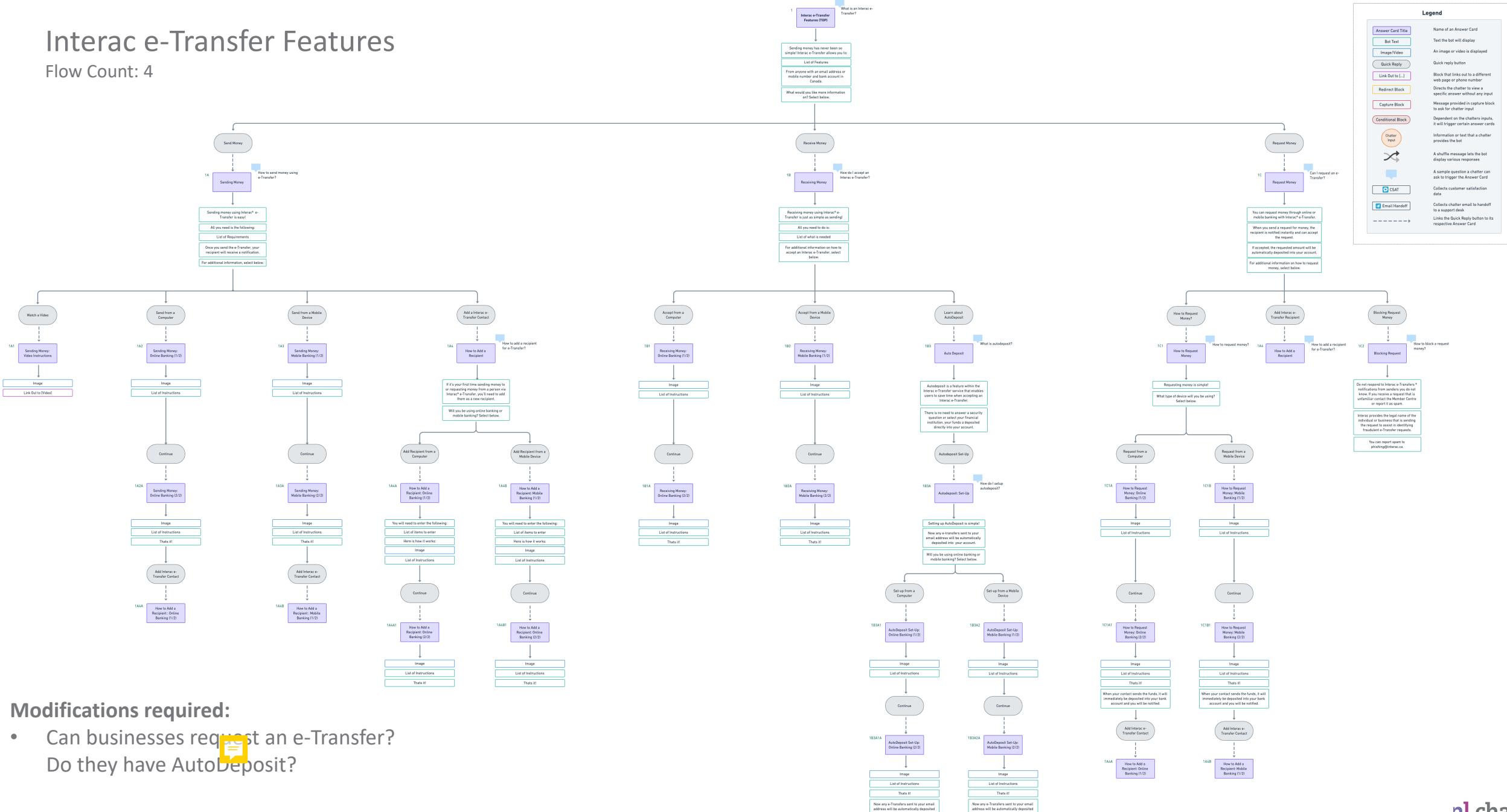
Modifications required:

- Similar questions to previous page, is this relevant?

Send Money

Interac e-Transfer Features

Flow Count: 4

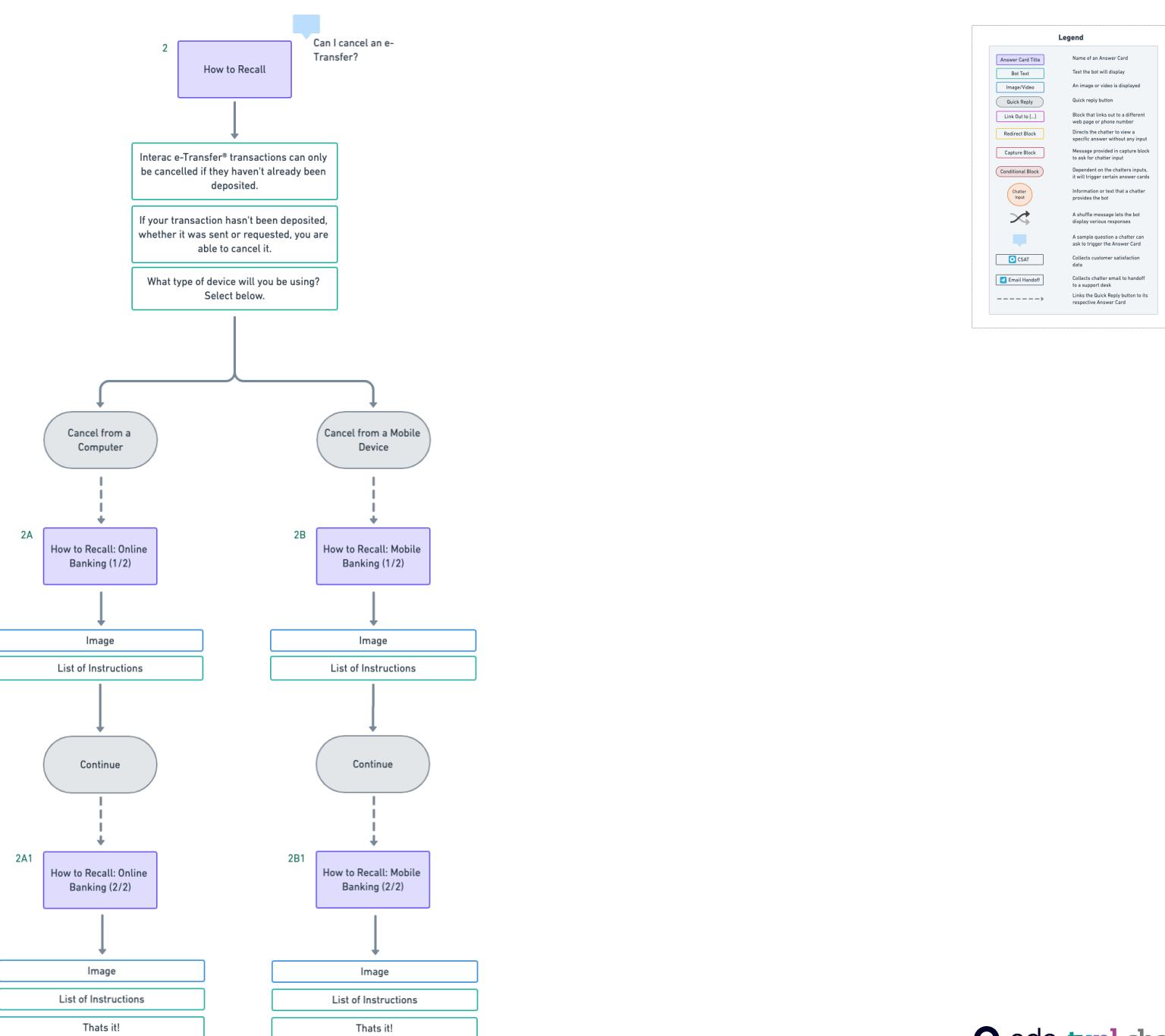


Modifications required:

- Can businesses request an e-Transfer?
Do they have AutoDeposit?

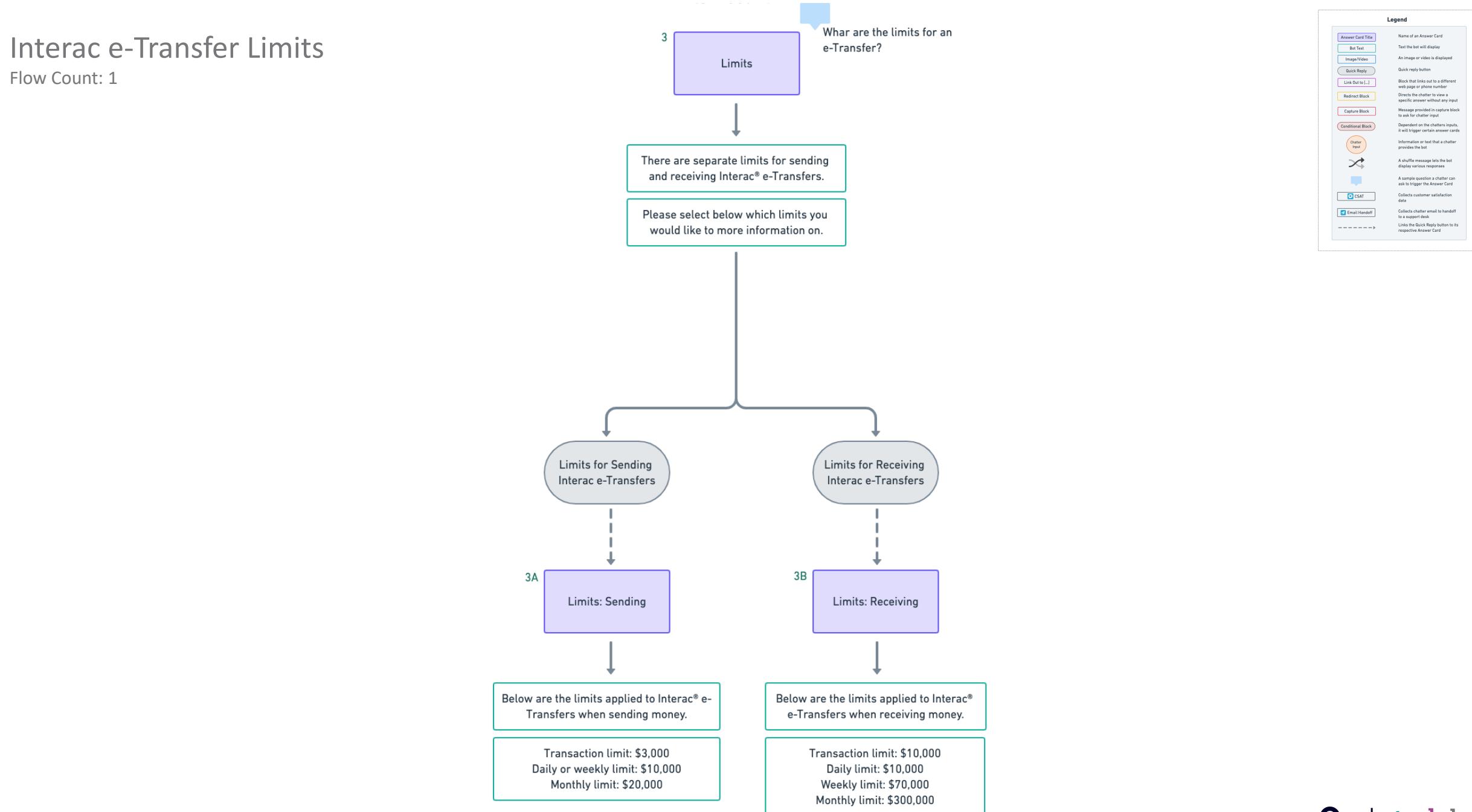
How to Recall an Interac e-Transfer

Flow Count: 1



Interac e-Transfer Limits

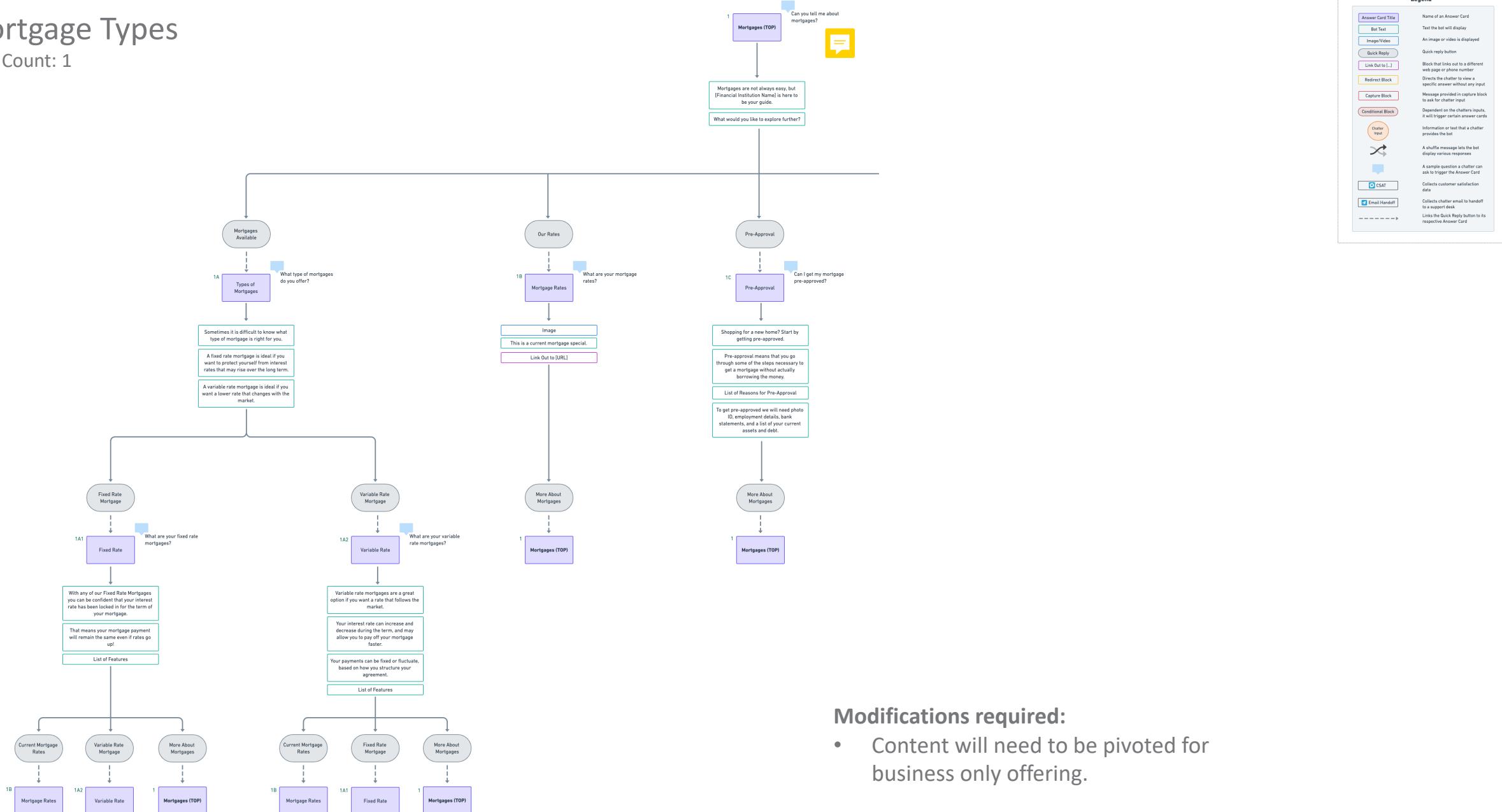
Flow Count: 1



Mortgages

Mortgage Types

Flow Count: 1

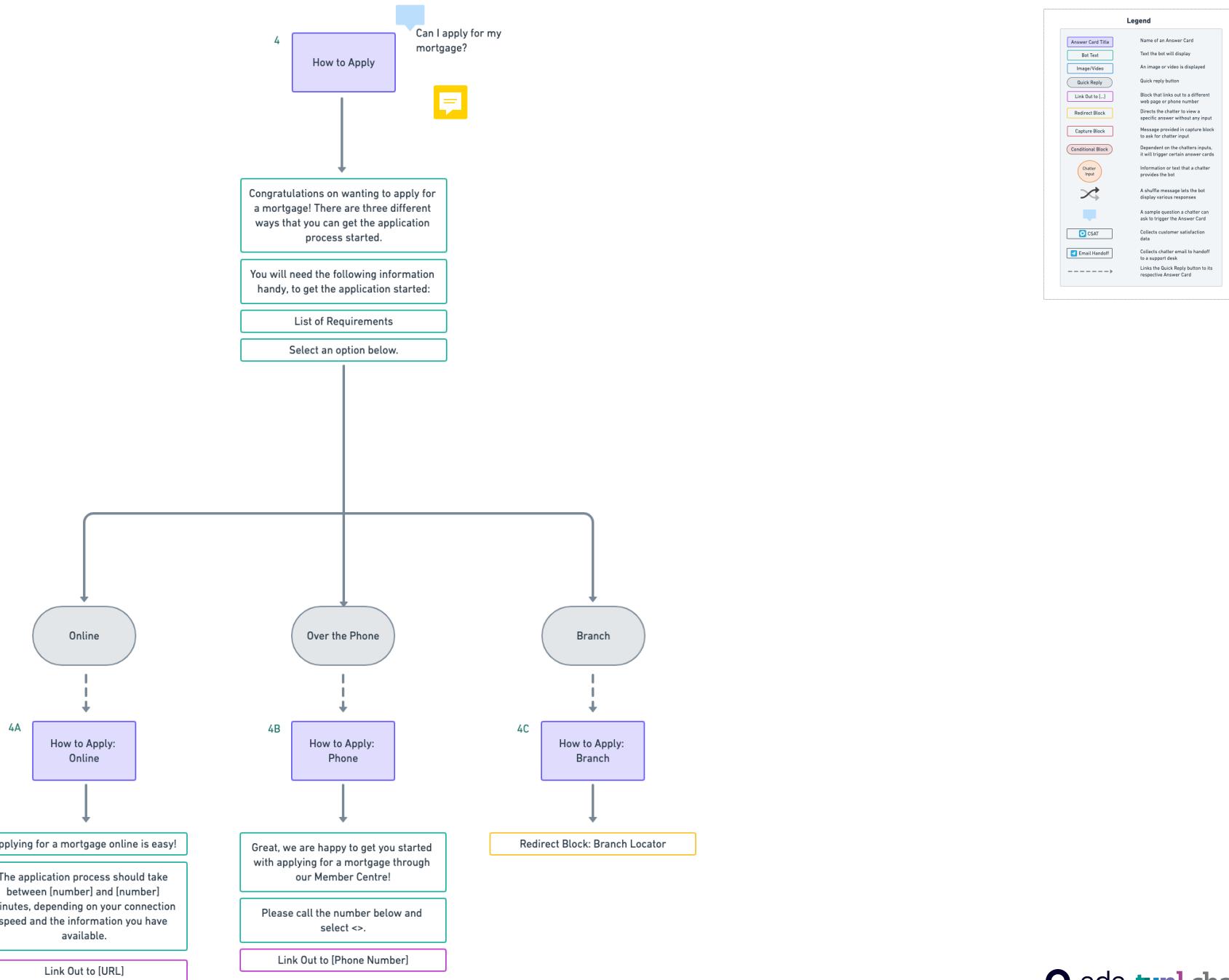


Modifications required:

- Content will need to be pivoted for business only offering.

Apply for Mortgage

Flow Count: 1



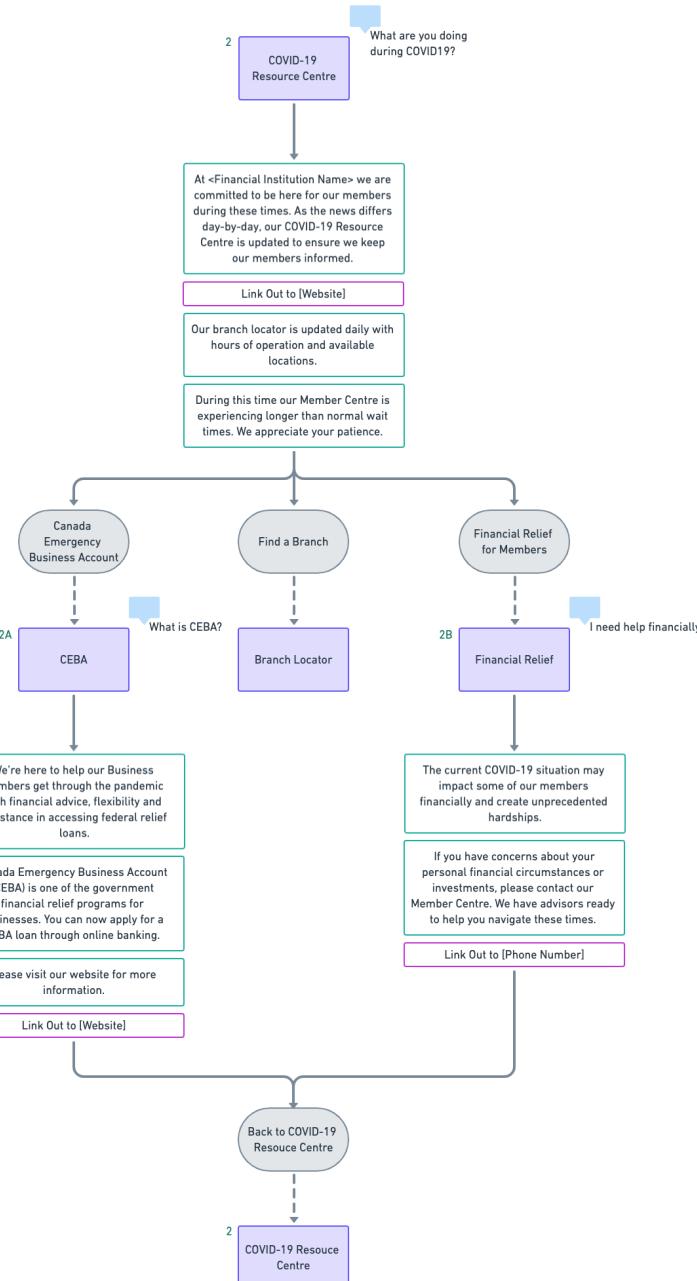
Modifications required:

- Similar modification as “How to Apply for Account” - feed in through email hand-off.

Temporary

COVID-19 Resource Centre

Flow Count: 1



Modifications required:

- Alter to be CEBA information heavy, you also may want to have placeholders for payment deferrals.