
Create an AI Virtual Assistant



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Overview

Chatbots make software accessible to everyone who understands human language. A customer can avoid the frustration that comes with having to memorize and navigate complex menus and button layouts that are always changing with software updates. Instead, computers can be operated with simple human language that people can understand. Customers can now simply ask a bot to take them where they want to go, or to enable a feature without having to hunt it down. Good bot services encourage users to engage more deeply with software features that might otherwise go unnoticed, because they provide a richer, more natural experience. For example, imagine an image editing suite that can respond to a command like: “Make the background of my photo darker.”

In addition to enhancing the customer experience, chatbots free up agents to respond to the more complex problems that are better solved by a customer service agent. When people are able to delegate a portion of their workload onto a conversational bot, they are now able to participate in higher value decision making for the company and expand their skills, which benefits the company and enriches the agents.

Industry Use -- HR Support Chatbot for Employee Queriers

The HR department of a large company, XYZ Enterprises, is inundated with a high volume of employee queries on a daily basis. To alleviate the HR team's workload and provide employees with quick and accurate responses, XYZ Enterprises decides to implement an HR Support Chatbot.

HR Support Chatbot Features

- **Query Resolution:** The chatbot is equipped to handle a wide range of employee inquiries, including questions about benefits, payroll, policies, leave requests, performance evaluations, and more.
- **Policy Clarifications:** Employees can ask the chatbot about company policies, such as dress code, code of conduct, remote work policies, and maternity/paternity leave policies. The chatbot provides detailed explanations to relevant policy documents.
- **Leave Management:** Employees can use the chatbot to submit leave requests, check their remaining leave balance, and inquire about the status of pending requests. The chatbot integrates with the company's HR system to provide real-time updates.
- **Payroll Information:** The chatbot offers employees access to their payroll information, including salary details, tax deductions, and payment schedules. It can also assist with setting up direct deposit and tax-related inquiries.
- **Training and Development:** Employees can inquire about available training programs, professional development opportunities, and workshops. The chatbot provides information on upcoming sessions and how to enroll.
- **Performance Feedback:** The chatbot assists employees in understanding their performance evaluations, 360-degree feedback, and goal-setting processes. It provides guidance on improvement areas and accessing performance-related resources.

- **Employee Assistance Programs (EAP):** The chatbot educates employees about available EAPs, how to access counseling services, and the types of issues EAPs can help with, such as stress management or work-life balance.
- **Health and Well-being:** Employees can inquire about health insurance coverage, wellness initiatives, fitness programs, and health-related benefits. The chatbot also provides tips on maintaining a healthy work-life balance.
- **Conflict Resolution:** The chatbot offers initial guidance on resolving workplace conflicts, emphasizing the importance of open communication, and suggesting when to involve HR for further assistance.

Benefits

- **Efficiency:** The HR Support Chatbot reduces the HR team's workload by handling routine inquiries, allowing HR staff to focus on more complex tasks.
- **Instant Access:** Employees can get quick answers to their queries at any time of the day, even outside of regular HR office hours.
- **Consistency:** The chatbot ensures that all employees receive consistent and accurate information, reducing the likelihood of miscommunication.
- **Empowerment:** Employees feel empowered to find answers independently, reducing dependency on HR staff for routine inquiries.
- **Data Insights:** The chatbot gathers data on common employee queries, helping HR identify trends and areas where additional employee training or information might be needed.

By implementing an HR Support Chatbot, XYZ Enterprises can enhance employee satisfaction, streamline HR operations, and foster a culture of self-service and empowerment among its workforces.

Estimated Time to Complete: 1 Hour

Objectives

Here's how you will implement your assistant:

The new Watson Assistant experience, focused on using **actions** to build customer conversations, is designed to make it simple enough for *anyone* to build a virtual assistant. Building, testing, publishing, and analyzing your assistant can all now be done in one simple and intuitive interface.

- New **navigation** provides a workflow for building, previewing, publishing, and analyzing your assistant.
- Each assistant has a **home page** with a task list to help you get started.
- Build conversations with **actions**, which represent 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.
- A new way to **publish** lets you review and debug your work in a draft environment before going live to your customers.
- Use a new suite of **analytics** to improve your assistant. Review which actions are being completed to see what your customers want help with, determine if your assistant understands and addresses customer needs, and decide how can you make your assistant better.
- Explore our [interactive demo site](#) to learn how Watson Assistant can be used to build powerful, scalable experiences for your users.

For more information about the new experience, see [FAQs about the new IBM Watson Assistant experience](#).

Visit [Getting started with Watson Assistant](#) for a tutorial series on building in the new experience. Use IBM Watson® Assistant to build your own branded live chatbot into any device, application, or channel. Your chatbot, which is also known as an *assistant*, connects to the customer engagement resources you already use to deliver an engaging, unified problem-solving experience to your customers.

Create AI-driven conversational flows

Your assistant uses industry-leading AI capabilities to understand questions that your customers ask in natural language. It uses machine learning models that are custom-built from your data to deliver accurate answers in real time.

Embed existing help content

You already know the answers to customer questions? Put your subject matter expertise to work. Add a search integration with IBM Watson® Discovery to give your assistant access to corporate data collections that it can mine for answers.

Connect to your customer service teams

If customers need more help or want to discuss a topic that requires a personal touch, connect them to human agents from your existing service desk provider.

*Bring the assistant to
your customers,
where they are*

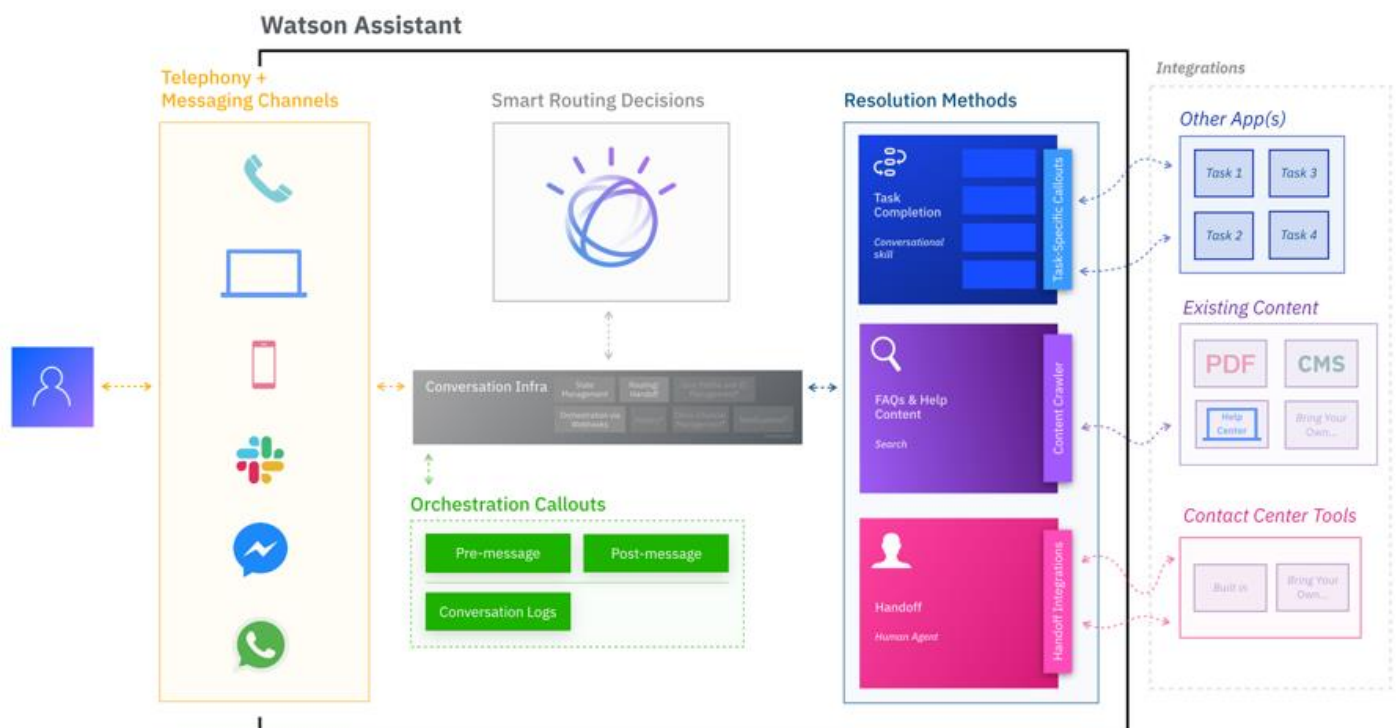
Configure one or more built-in integrations to quickly publish your assistant on popular social media platforms such as Slack, Facebook Messenger, Intercom, or WhatsApp. Turn the assistant into a member of your customer support call center team, where it can answer the phone and address simple requests so its human teammates can focus on more nuanced customer needs. Make your assistant the go-to help resource for customers by adding it as a chat widget to your company website. If none of the built-in integrations fit your needs, use the APIs to build your own custom app.

Track customer engagement and satisfaction

Use built-in metrics to analyze logs from conversations between customers and your assistant to gauge how well it's doing and identify areas for improvement.

How it works

This diagram illustrates how IBM Watson® Assistant delivers an exceptional, omnichannel customer experience:



Customers interact with the assistant through one or more of these channels:

- A web chat that you embed in your company website and that can transfer complex requests to a customer support representative.
- An existing social-media messaging platform, such as Slack, Facebook Messenger, or WhatsApp
- A phone call or text message

- A custom application that you develop, such as a mobile app or a robot with a voice interface

The **assistant** receives a message from a customer and sends it down the appropriate resolution path. If you want to pre-process incoming messages, this is where you can use webhooks to inject logic that calls an external service that can process the messages before the assistant routes them. Likewise, you can process responses from the assistant before they are returned to the customer.

The assistant chooses the appropriate resolution from among these options:

- An **action** interprets the customer's message further, then directs the flow of the conversation. The action gathers any information it needs to respond or perform a transaction on the customer's behalf.
- A **search integration** uses existing FAQ or other curated content that you own to find relevant answers to customer questions.
- If a customer wants more personalized help or wants to discuss a sensitive subject, the assistant can connect the customer with someone from your support team through the web chat or phone integration.

To see how Watson Assistant is helping enterprises cut costs and improve customer satisfaction today, read the [Independent study finds IBM Watson Assistant customers can accrue \\$23.9 million in benefits](#) blog on ibm.com.

Prerequisites

This lab requires that you have an IBM Cloud Account, if you have not yet created your IBM Cloud Account please refer to the following links:

- [How to create an IBM Cloud account](#) ([日本語](#), [Português](#))
- [How to request an IBM Cloud Feature Code](#) ([日本語](#), [Português](#))
- [How to apply an IBM Cloud Feature Code](#) ([日本語](#), [Português](#))

It is also recommended that you use Firefox, IE, or Chrome and avoid Edge and Safari browsers.

Milestone 1: Create Watson Assistant Service

Milestone Overview

This lab requires you to complete seven Milestones:

1. **Create Watson Assistant Service**
2. Create an Action
3. Import Actions from catalog
4. Publish your chatbot

This guide is an instructional approach to working with the IBM Watson™ Assistant service where you can create virtual agents and bots that combine machine learning, natural language understanding, and integrated dialog tools to provide automated customer engagements. Creating your first conversation using the IBM Watson™ Assistant service entails the following steps:

Steps

Complete the following steps:

1. Login into IBM Cloud: <https://cloud.ibm.com>
2. Click the **Catalog** tab.
3. Search for the **Watson Assistant** service and click that tile under the AI heading.
4. Select **Dallas** as your location and click **Accept** in the check box in the black panel to the right and then click **Create**.

After you create a Watson Assistant service instance, you land on the **Manage** page of the Watson Assistant dashboard.

5. Click **Launch Watson Assistant**.
6. You begin by specifying a name, for example: **HR support for training and development**.
7. You may wish to include a description, for example: **Learners from various backgrounds inquire about available training programs, professional development and workshops**.
8. At this point, click **Next**.


Welcome to the new Watson Assistant

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.

Assistant name

HR support for training and development

Your assistant name will be kept internally and not visible to your customers

Description (optional)

Learners from various backgrounds inquire about available training programs, professional development and workshops.

116/128

Assistant language

English (US)

This is the language your assistant will speak.

- In the Personalization tab, select **Web** as to where you want to deploy your chatbot (note all the other options that you have). Complete the remaining dialog boxes as you see fit and click **Next**.

IBM Watson Assistant Lite Upgrade HR support for ... Learning resources


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?

Web

Tell us about yourself

This information will be used to personalize your onboarding experience.

Which industry do you work in?

N/A (I am a student)

What is your role on the team building the assistant?

Developer

Which statement describes your needs best?

I want to provide confident answers to common questions

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.

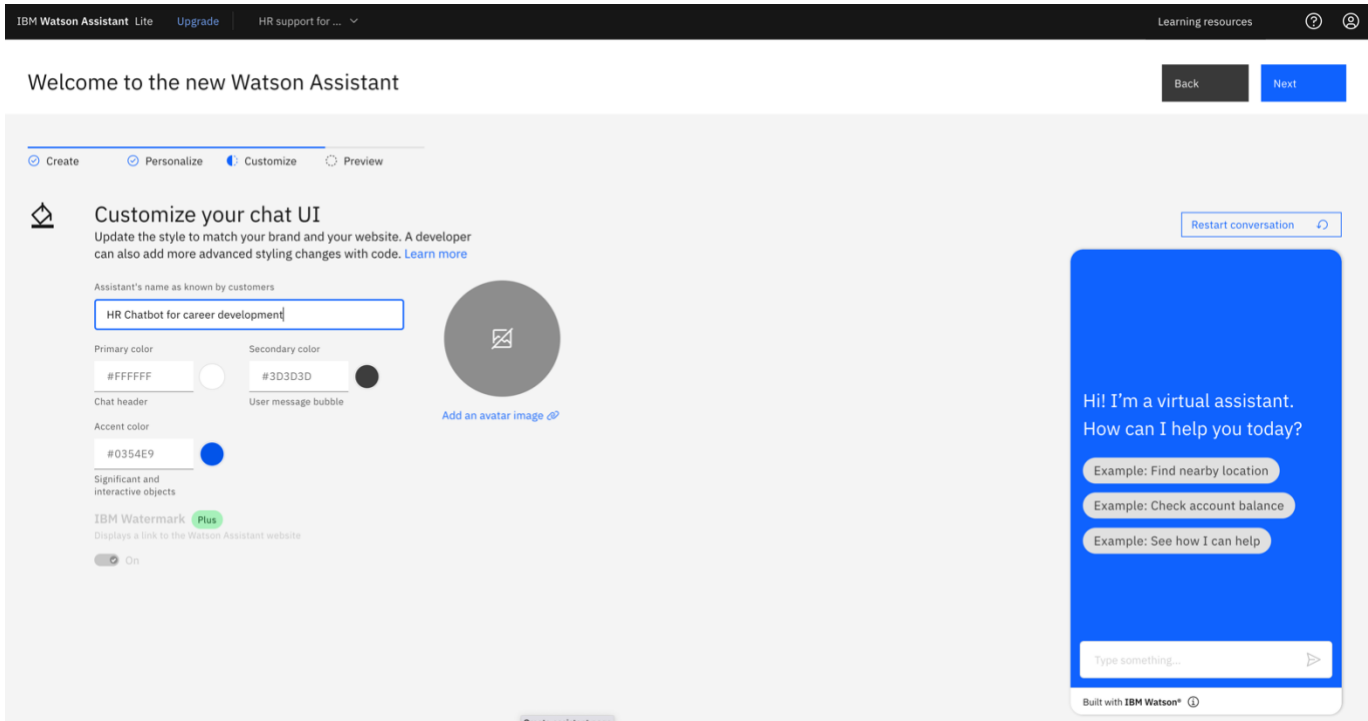
You can purchase them for curbside pick up or we can ship them to you. Which would you prefer?

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

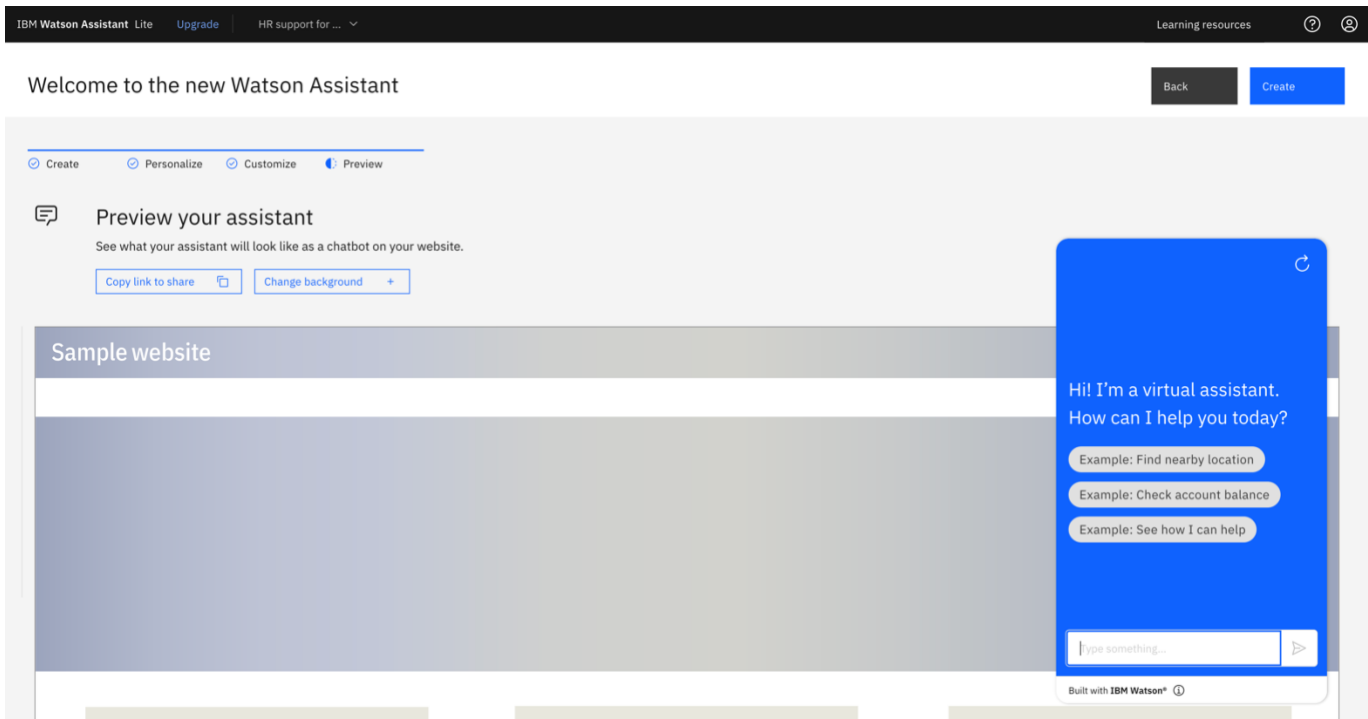
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10. In the customize tab there is no need for any updates here; we will customize our chatbot in a later step; however, note the various ways you can customize your web appearance and feel free to make certain updates here per your choosing.



11. Click Next and then click Create.



12. Take a moment, or rather 5 minutes and watch the Learn about Watson Assistant.

IBM Watson Assistant Lite Upgrade HR support for ... Learning resources

Home

Welcome, you're in the new Watson Assistant!

We have some exciting changes in store for you

[Take a tour](#)

Learn to build
New! We've assembled all the resources you need to learn how to build your assistant in an easy-to-consult hub.
[Go to resources](#)

Easy to use
Now anyone can build a fully-functioning assistant without the usual heavy lift from a development team.
[View documentation](#)

New features
The new Watson Assistant is loaded with features that empower you to meet the complexity of customer needs.
[See what's new](#)

HR support for training and development | English (US)
Learners from various backgrounds inquire about available training programs, professional development and workshops.

Get started
3 steps left 7 min

☐ Learn about Watson Assistant 5 min

☐ Explore your learning resources **New!**
Check out our new set of learning resources, and mark complete when you're ready to continue.

☐ Explore Watson Assistant features on interactive demo site 2 min

Create a conversation
3 steps left 15 min

☐ Create your first action 5 min

☐ Create steps 5 min

☐ Add 5 examples 5 min

Share with your team

13. Once you have completed the first item, select the third step: **Explore Watson Assistant features on interactive demo site** (2 minutes)

14. You are now ready to create Actions. Think of Actions as the *intention* that the users may have or *questions*, they may ask of the chatbot about a certain domain of knowledge. Click **Create your first action**.

Home

Get started
3 steps left 7 min

☐ Learn about Watson Assistant 5 min

☐ Explore your learning resources **New!**
Check out our new set of learning resources, and mark complete when you're ready to continue.

☐ Explore Watson Assistant features on interactive demo site 2 min

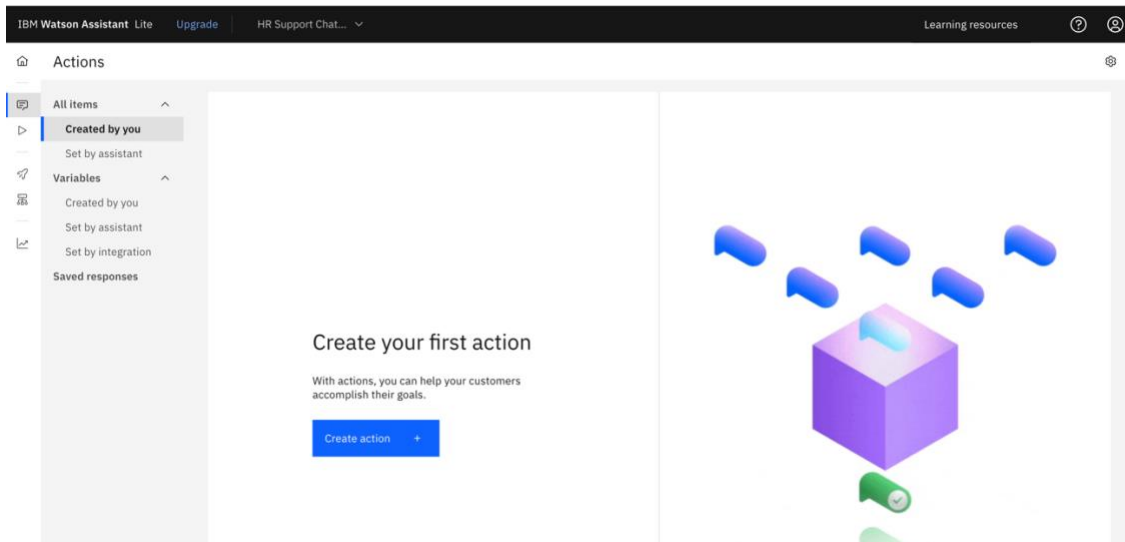
Create a conversation
3 steps left 15 min

☐ [Create your first action](#) 5 min

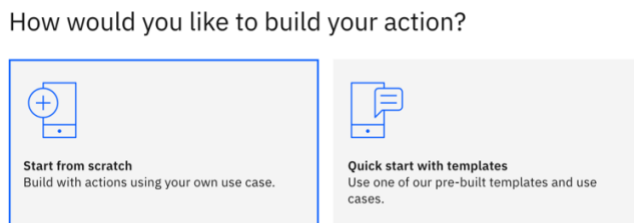
☐ Create steps 5 min

☐ Add 5 examples 5 min

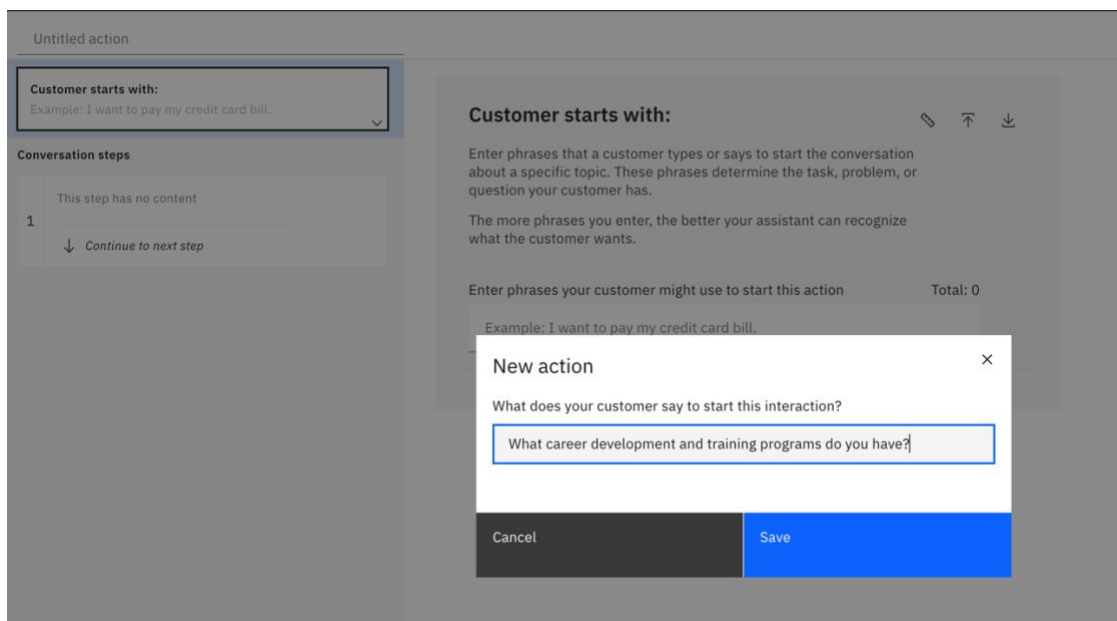
15. In the ensuing page, click the blue button, **Create action**.



16. Click **Start from scratch**.



17. Think about what utterances your customers may have when they first respond to the chatbot. For example, type in the dialog box: **What career development and training programs do you have?** And click **Save**.



18. Click the first box, **Customer starts with:** and enter additional utterances that you may ask the chatbot. The following screen capture displays some examples. Feel free to include those or your own utterances related to the subject of asking help from an HR department about training, workshops or seminars that they have to help you gain more skills in your pursuit.

IBM Watson Assistant Lite Upgrade HR Support Chat... ▾

What career development and training programs do you

Customer starts with:
What career development and training programs do you have? ▾

Conversation steps

1 This step has no content
↓ Continue to next step

Customer starts with:

Enter phrases that a customer types or says to start the conversation about a specific topic. These phrases determine the task, problem, or question your customer has.

The more phrases you enter, the better your assistant can recognize what the customer wants.

Enter phrases your customer might use to start this action Total: 11

Enter a phrase

- I would like to take a course.
- Are there any workshops and labs and exercises for tech careers?
- Do you have any classes on career development?
- What are some of your training programs?
- What are some of your workshops?
- How can I enroll in a job training program?
- Are there mentorship programs?
- What career development pathways do you have?
- Do you have training programs?
- What career development and training programs do you have?

New step +

19. Click the **Save** icon in the top right corner of the page.
20. Click the second box, your first Action, below the *Customer starts with:* box.
21. In the dialog box you can type, for example: **Hello, happy to help. Let me present you with four of our core offerings and select the option you are most interested to learn.** Or you can type your own utterance for the first response you will get from the chatbot should you ask any (or similar) to question you defined in the starting dialog box.

22. In the Define Customer response section, select **Options**.

IBM Watson Assistant Lite Upgrade HR support for ...

What career development and training programs do you

Customer starts with:
What career development and training programs do you have?

Conversation steps

1

Hello, happy to help. Let me present you with four of our core offerings and select the option you are...

Continue to next step

New step +

Step 1

Is taken without conditions

Set variable values

Assistant says

Hello, happy to help. Let me present you with four of our core offerings and select the option you are interested to learn more.

Define customer response

System

Options

Confirmation

Regex

Number

Date

Time

Currency

Saved

Options

Enable customers to select from a set of choices. If more than 4, options show as a list.

As buttons

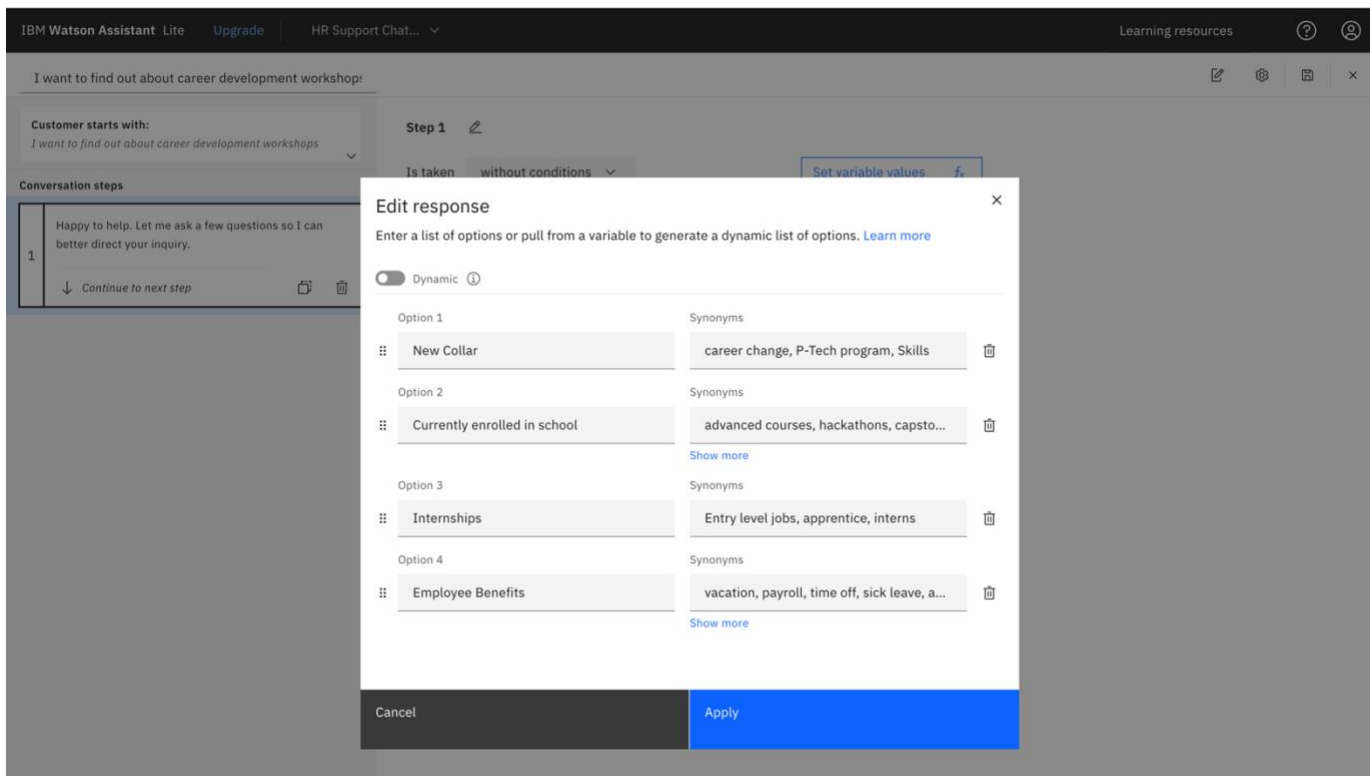
Checking Savings 401 (k) Roth IRA

As a list

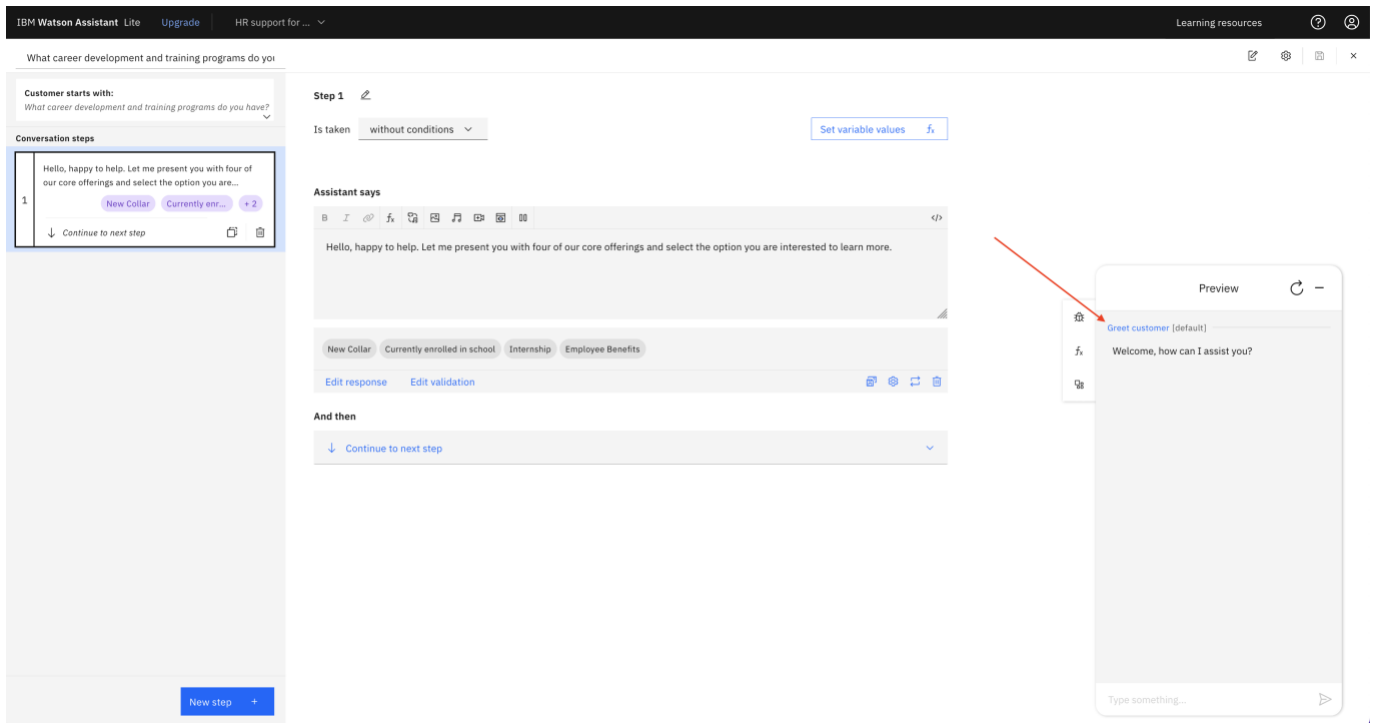
Pay Bill

23. Enter the following four different options with synonyms that serve to help the chatbot to understand the colloquial way of speaking. Please bear in mind, that these utterances are merely examples, feel free to use your own synonyms.

New Collar	Career change, P-Tech programs, skills
Currently enrolled in school	Advanced courses, hackathons, capstone
Internship	Entry level jobs, apprentice, interns
Employee Benefits	Benefits policy, sick time, payroll



24. Click **Apply**. Notice the blue bar on top? The system is training, allow it a few seconds to complete.
25. Click the **Preview** link in the bottom right corner to open the chatbot and then click **Greet Customer** link to personalize the greeting message.

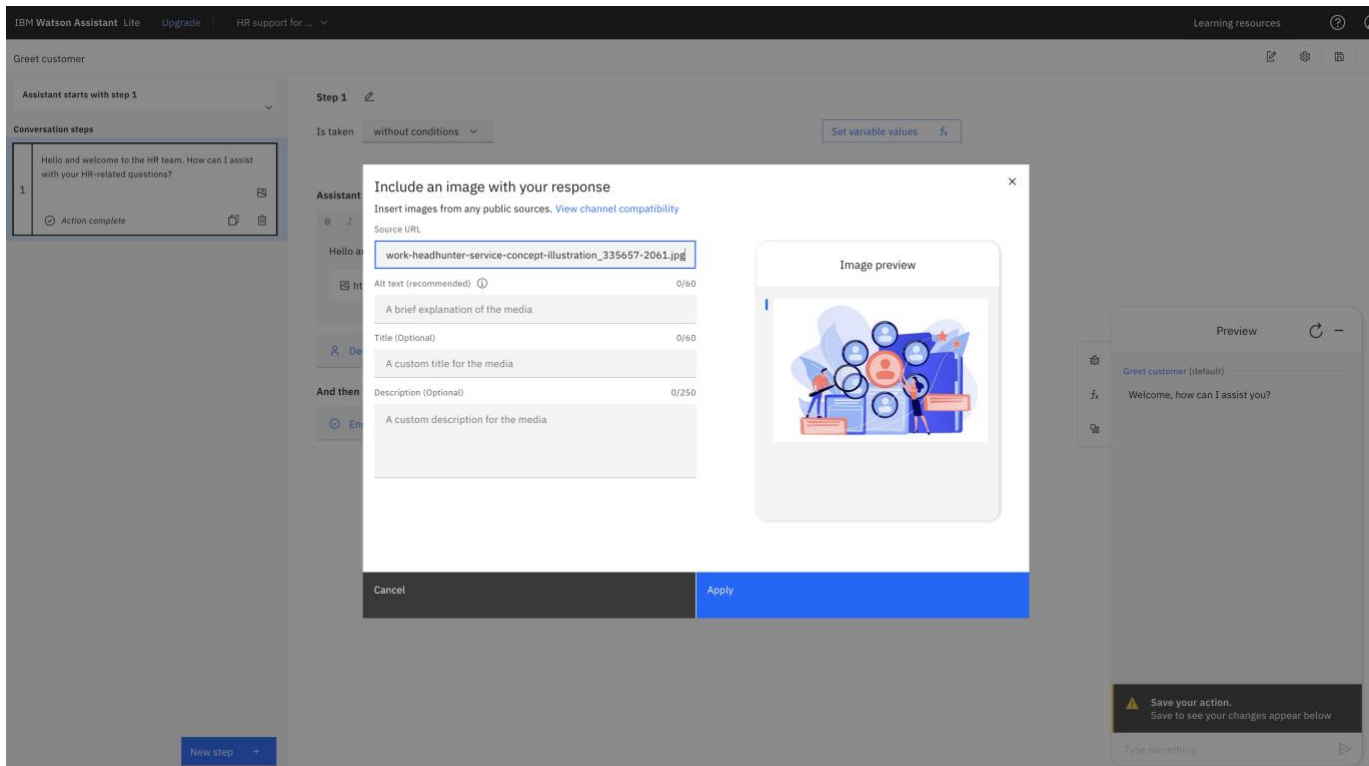


26. Type or copy/paste the following greeting:

Hello and welcome to the HR team. How can I assist with your HR-related questions?

27. Include an image, for example the link below might do the trick. Feel free to find your own free image or type your own greetings in your own words.

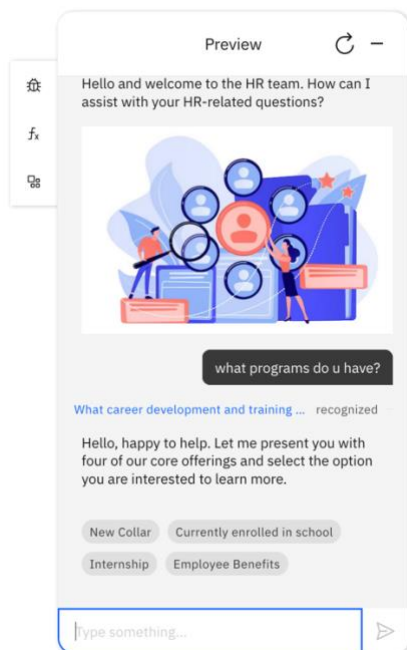
https://img.freepik.com/free-vector/human-resources-managers-doing-professional-staff-research-with-magnifier-human-resources-hr-team-work-headhunter-service-concept-illustration_335657-2061.jpg



28. Click **Apply** and click **Save**.

29. Now, refresh your chatbot dialog and notice the new greeting with your image.

30. Try out the chatbot and ask your first question, for example: *what programs do u have?*
(Notice how 'you' is misspelled?)



It is time to make options actual links using conditional statements. Each link will open its related dialog box. You are now ready to begin creating more steps.

31. Minimize the chatbot dialog and click **New step**.

32. Select **with conditions** from the drop-down list from the *Is taken* section.

The screenshot displays the IBM Watson Assistant configuration interface. On the left, a chatbot dialog is shown with a customer inquiry: "I want to find out about career development workshop: How can I enroll in more education?". The dialog consists of five steps. Step 2 is highlighted, showing a response about New Collar programs. On the right, the configuration for Step 2 is shown. The "Is taken" dropdown is set to "with conditions". The "Conditions" section shows a single condition: "1. Happy to help. L..." is "New Collar". The "Assistant says" section contains the text: "New Collar programs can be found across the globe! With the current focus on the skills gap in the technology industry, other companies are launching programs similar to IBM's and are re-thinking their hiring process to ensure all candidates with skills are able to qualify for roles. You may hear the phrase New Collar being used external to IBM as our thought leadership in this area grows! Every IBM unit is participating in some version of a New Collar program, either in direct hiring partnerships or apprenticeships. And we're expanding programs to other countries. This isn't just limited to the US – IBM has long had successful apprentice programs in the UK, and Singapore just recently launched their New Collar Apprentice Program. [You can learn more about New Collar here!](\"https://w3.ibm.com/w3publisher/us-benefits/\")".

33. Click in the condition box after 'is' and select the **New Collar**.

34. Type the following text in the Assistant says section and preserve and test the link in the text below and in your dialog.

New Collar programs can be found across the globe! With the current focus on the skills gap in the technology industry, other companies are launching programs similar to IBM's and are re-thinking their hiring process to ensure all candidates with skills are able to qualify for roles. You may hear the phrase New Collar being used external to IBM as our thought leadership in this area grows! Every IBM unit is participating in some version of a New Collar program, either in direct hiring partnerships or apprenticeships. And we're expanding programs to other countries. This isn't just limited to the US – IBM has long had successful apprentice programs in the UK, and Singapore just recently launched their New Collar Apprentice Program. [You can learn more about New Collar here!](https://w3.ibm.com/w3publisher/us-benefits/)

Note: ensure that the links within all dialog boxes are working properly. They are embedded in the blue highlighted words or sentence.

IBM Watson Assistant Lite Upgrade HR Support Chat...

I want to find out about career development workshop:

Customer starts with:

How can I enroll in more education?

Conversation steps

Happy to help. Let me present you with our four core offerings so I can better direct your inquiry.

1

Employee Be... New Collar + 2

Continue to next step

1 is New Collar

2

New Collar programs can be found across the globe! With the current focus on the skills gap in the...

Continue to next step

1 is Currently enrolled in school

3

So glad you are seeking to augment your current education and skills through your academic program....

Continue to next step

1 is Internships

4

We currently have 17 locations that have adopted the Tech Re-Entry program. There are six states (NY, OH,...

Continue to next step

1 is Employee Benefits

5

For benefits support please use the [U.S. Benefits Hub] (https://w3.ibm.com/w3publisher/us-benefits/), your...

Continue to next step

New step +

Step 2

Is taken with conditions

Set variable values f_x

Conditions

1 condition

If All of this is true:

1. Happy to help. L... is New Collar

defined

Employee Benefits

New Collar

Currently enrolled in school

Internships

and Add condition +

New condition group +

Assistant says

B I f_x

New Collar programs can be found across the globe! With the current focus on the skills gap in the technology industry, other companies are launching programs similar to IBM's and are re-thinking their hiring process to ensure all candidates with skills are able to qualify for roles. You may hear the phrase New Collar being used external to IBM as our thought leadership in this area grows!Every IBM unit is participating in some version of a New Collar program, either in direct hiring partnerships or apprenticeships. And we're expanding programs to other countries. This isn't just limited to the US – IBM has long had successful apprentice programs in the UK, and Singapore just recently launched their New Collar Apprentice Program.[You can learn more about New Collar here!](#)

Define customer response

And then

Continue to next step

You are now ready to create your third step that caters to one of the other conditions.

35. Click **New Step**.

36. Select **with conditions** and in the conditions detail section select **Currently enrolled in school**.

37. Copy and paste the following text in the dialog box:

So glad you are seeking to augment your current education and skills through your academic program. [SkillsBuild](#) program is designed to fit perfectly with your curriculum.

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I want to find out about career development workshop:

Conversation steps

1 Happy to help. Let me present you with our four core offerings so I can better direct your inquiry.

↓ Continue to next step

1 is New Collar

2 New Collar programs can be found across the globe! With the current focus on the skills gap in the...

↓ Continue to next step

1 is Currently enrolled in school

3 So glad you are seeking to augment your current education and skills through your academic program....

↓ Continue to next step

1 is Internships

4 We currently have 17 locations that have adopted the Tech Re-Entry program. There are six states (NY, OH,...

↓ Continue to next step

1 is Employee Benefits

5 For benefits support please use the [U.S. Benefits Hub] (https://w3.ibm.com/w3publisher/us-benefits/), your...

↻ Connect to agent

Step 3

Is taken with conditions

Set variable values f_x

Conditions 1 condition

If All of this is true:

1. Happy to help. L... is Currently enrolled in school

and Add condition +

New condition group +

Assistant says

So glad you are seeking to augment your current education and skills through your academic program. [SkillsBuild](#) program is designed to fit perfectly in your schools curriculum.

Define customer response

And then

↓ Continue to next step

New step +

Let's create the fourth step.

38. Click **New Step**.

39. Select **with conditions** and in the conditions detail section select **Internships**

40. Copy and paste the following text in the dialog box:

We currently have 17 locations that have adopted the Tech Re-Entry program. There are six states (NY, OH, MA, GA, NC, TX) and three countries (US, Canada, and India) participating in the model. Check out this link for available [Tech Re-Entry roles](#)!

IBM Watson Assistant
Life
Upgrade
HR Support Chat...

I want to find out about career development workshop:

Conversation steps

1
Happy to help. Let me present you with our four core offerings so I can better direct your inquiry.
Employee Be...
New Collar
+ 2
Continue to next step

1
is
New Collar
New Collar programs can be found across the globe! With the current focus on the skills gap in the...
Continue to next step

1
is
Currently enrolled in school
So glad you are seeking to augment your current education and skills through your academic program....
Continue to next step

1
is
Internships
We currently have 17 locations that have adopted the Tech Re-Entry program. There are six states (NY, OH,...
Continue to next step

1
is
Employee Benefits
For benefits support please use the [U.S. Benefits Hub] (https://w3.ibm.com/w3publisher/us-benefits/), your...
Connect to agent

New step

Step 4

Is taken
with conditions
Set variable values

Conditions
1 condition
If
All
of this is true:
1. Happy to help. L...
is
Internships
and
Add condition
New condition group

Assistant says

We currently have 17 locations that have adopted the Tech Re-Entry program. There are six states (NY, OH, MA, GA, NC, TX) and three countries (US, Canada, and India) participating in the model. Check out this link for available [Tech Re-Entry roles!](#)

Define customer response

And then
Continue to next step

41.

Let's create the fifth step.

42. Click **New Step**.

43. Select **with conditions** and in the conditions detail section select **Employee Benefits**

44. Copy and paste the following text in the dialog box:

For benefits support please use the [U.S. Benefits Hub](#), your one-stop destination for all of the latest news, benefits updates, resources and contacts during Annual Enrollment and throughout the year. **Important!** Employees can find the latest info about their 2023 benefits on the US Benefits Hub. For questions about your benefits and help with the benefits enrollment process you can contact the IBM Benefits Center—Provided by Fidelity at 866-937-0720. Available on business days (excluding holidays recognized by the New York Stock Exchange, except Good Friday) between 8:30 a.m. and 8:30 p.m. ET.

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45. Scroll down and in the section: *And then*, from the drop-down list, select **Connect to agent**.
46. Save your changes.

IBM Watson Assistant Lite Upgrade HR Support Chat... ▾

I want to find out about career development workshop:

Conversation steps

Happy to help. Let me present you with our four core offerings so I can better direct your inquiry.

1

Employee Be... New Collar + 2

↓ Continue to next step

1 is New Collar

New Collar programs can be found across the globe! With the current focus on the skills gap in the...

2

↓ Continue to next step

1 is Currently enrolled in school

So glad you are seeking to augment your current education and skills through your academic program....

3

↓ Continue to next step

1 is Internships

We currently have 17 locations that have adopted the Tech Re-Entry program. There are six states (NY, OH,...

4

↓ Continue to next step

1 is Employee Benefits

For benefits support please use the [U.S. Benefits Hub] (https://w3.ibm.com/w3publisher/us-benefits/), your...

5

Connect to agent

New step +

If All ▾ of this is true:

1. Happy to help. L... is Employee Benefits ×

and Add condition +

New condition group +

Assistant says

B I @ fx ↺ ↻ ↺ ↻ ↺ ↻ ↺ ↻ ↺ ↻

For benefits support please use the [U.S. Benefits Hub](#), your one-stop destination for all of the latest news, benefits updates, resources and contacts during Annual Enrollment and throughout the year.

Important! Employees can find the latest info about their 2023 benefits on the US Benefits Hub.

For questions about your benefits and help with the benefits enrollment process you can contact the IBM Benefits Center—Provided by Fidelity at 866-937-0720. Available on business days (excluding holidays recognized by the New York Stock Exchange, except Good Friday) between 8:30 a.m. and 8:30 p.m. ET.

Define customer response ▾

And then

Connect to agent (action ends) ▾

If online Let's send you to an available agent.

If offline There are no agents available at this time. When one becomes available, we'll connect you.

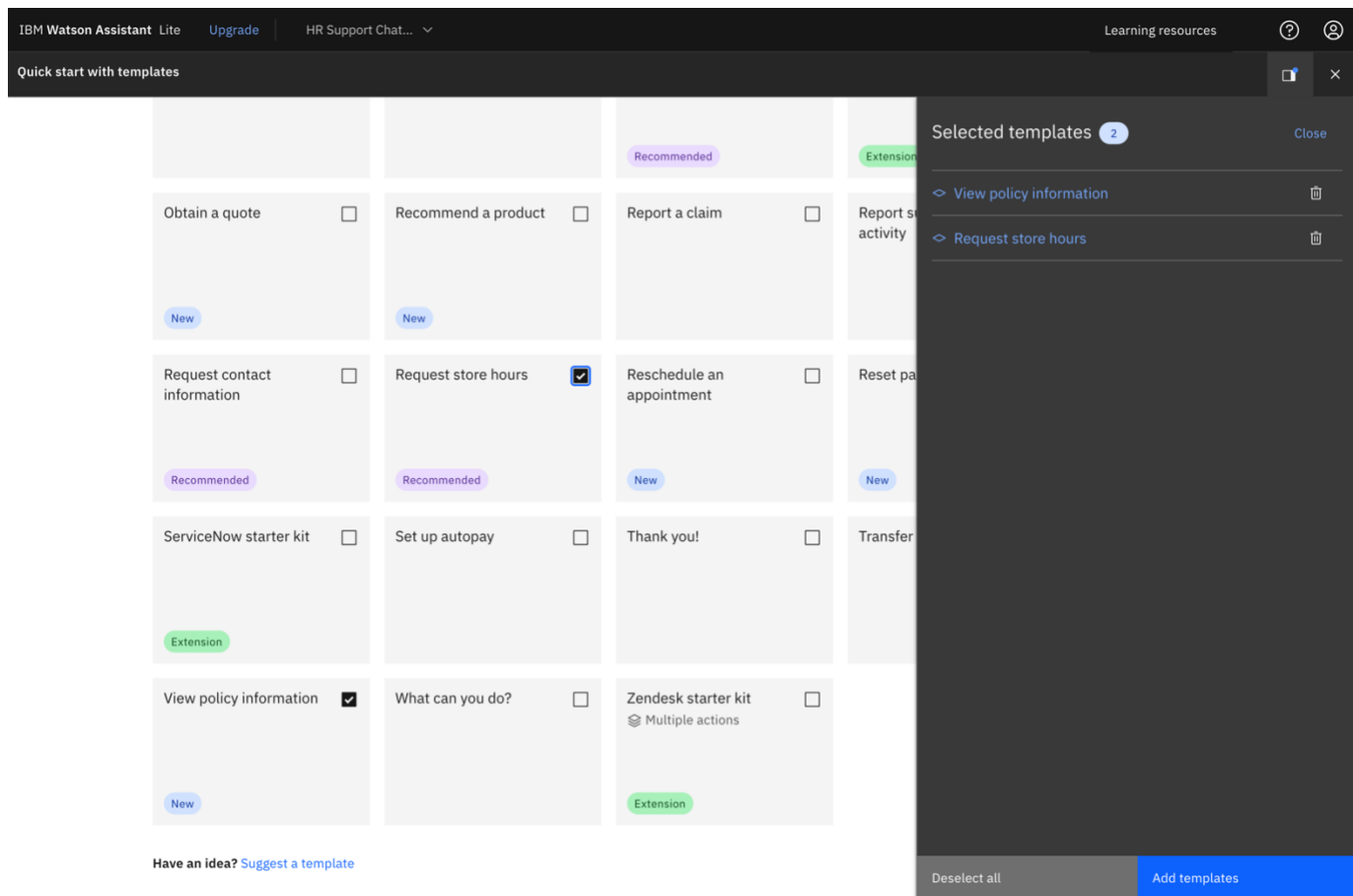
To the agent

Congratulation, you have created all needed aspects for your first Action. In the next section you will upload already existing templates for two other Actions from the **Quick Start with templates** section.

Milestone 2: Import an Existing Conversation

You are now ready to use pre-built Actions that perform certain tasks. Complete the following steps:

1. Click the x icon in the top right-most corner of the page to close the current view.
2. Click New Action in the top right corner and select **Quick Start with templates**.
3. Scroll down and select two templates to import, and **click Add templates**.
 - Request store hours (all you will have to do here is change all instances of *store* to **workshop**)
 - View policy information (all you must do here is change all instances of *policy* to **Benefit**)



4. Save your work.

- From the **Actions** page, click the three dots and change the name of the Action per below: replace all instances of *store* with **workshop** and, afterwards, replace *policy* with **Benefits**.

Name	Last edited	Examples count	Steps count	Status
1 want to find out about career development wor...	3 days ago	7	5	✓
Request workshop hours	3 days ago	20	8	✓
View Benefits information	3 days ago	8	9	

- Open the newly imported Request workshops hours (with the new name).
- To start, find all mentions of store and change it to workshop. In all dialog boxes...everywhere (and if you missed a few, that's OK). The questions here that a customer may ask has to do with where and when (not the *what*, but **when** and the **where**).

Request workshop hours

Customer starts with:
What training do you have?

Conversation steps

1 Let me get that information for you. Do you know which workshop you'd like to visit?
Yes No
Continue to next step

2 1 is No
No problem! We can help you find the event closest to you. What's your zip code?
Number
Continue to next step

2 > 0 2 < 30000
Thanks! Your closest workshop/training is in Hollywood. Our hours are 7am-6pm PST,...

3 Action complete

2 ≥ 30000
Thanks! Your workshop is in Tribeca. Our hours are 9am-3pm EST, Mondays through Saturdays. ...

4 Action complete

1 is Yes
Great! Which workshops or training are you inquiring

New step +

Customer starts with:

Enter phrases that a customer types or says to start the conversation about a specific topic. These phrases determine the task, problem, or question your customer has.

The more phrases you enter, the better your assistant can recognize what the customer wants.

Enter phrases your customer might use to start this action Total: 20

Enter a phrase

- What locations are training conducted?
- Where are the events, workshops, training located?
- When are the workshops held?
- Where are the workshops or seminars taking place
- Are you open on sundays, and if so what are the hours?
- At what hour can I swing by?
- Can you tell me how late the workshops or are open till?
- Are there workshops or seminars on weekends?
- How early do you open?

8. Repeat similar steps as with the prior steps by first closing all open Actions and then open the third Action: View policy information.
9. Change the Action name (the three dots) to **View Benefits information**.
10. Look for the word *policy* in all the steps of this Action and change them to **Benefits**. While you are at it, observe some of the conditions used in this template.
11. Enter some new utterances and delete some that are not germane HR Benefits. Most, if not all utterances out-of-box will work with Benefits instead of policy in the verbiage.

IBM Watson Assistant Lite Upgrade HR Support Chat... ▾

View Benefits information

Customer starts with:
What are my Benefits?

Conversation steps

1 I'd be happy to help!
 For benefits support please use the [U.S. Benefits Hub]...

Confirmation

↓ Continue to next step

1 is No

2 Alright! Let me know if you need anything else.

✔ Action complete

1 is Yes

3 Sounds good. To get started, please enter your email address below.

Regex

↓ Continue to next step

4 Great. Next, please enter your date of birth in MM-DD-YYYY format.

Date

↓ Continue to next step

5 Alright. Finally, please specify the time period during which you'd like your Benefits information.

beginning of ...
last 6 months
+ 4

New step +

Customer starts with:

Enter phrases that a customer types or says to start the conversation about a specific topic. These phrases determine the task, problem, or question your customer has.

The more phrases you enter, the better your assistant can recognize what the customer wants.

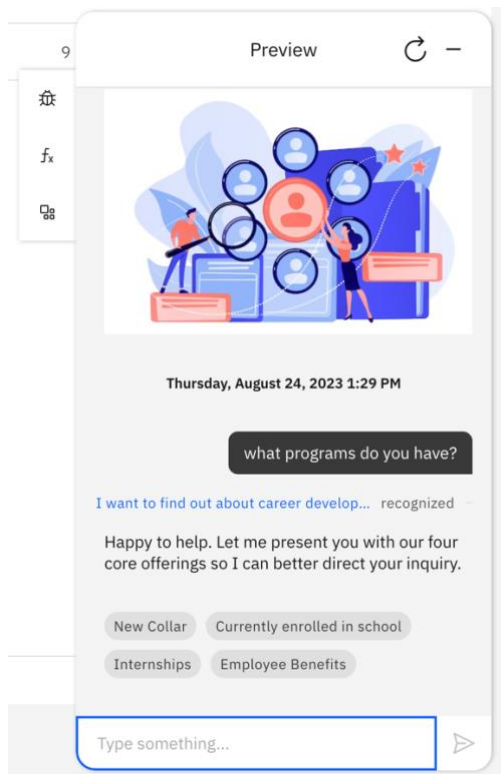
Enter phrases your customer might use to start this action Total: 8

Enter a phrase

Where's the Benefits information document you sent me	✕
View Benefits information	✕
View benefits details	✕
Get benefits information	✕
Find Benefits document	✕
Can you send me a copy of my Benefits details	✕
What employee Benefits do you have?	✕
What are my Benefits?	✕

12. Save your changes.

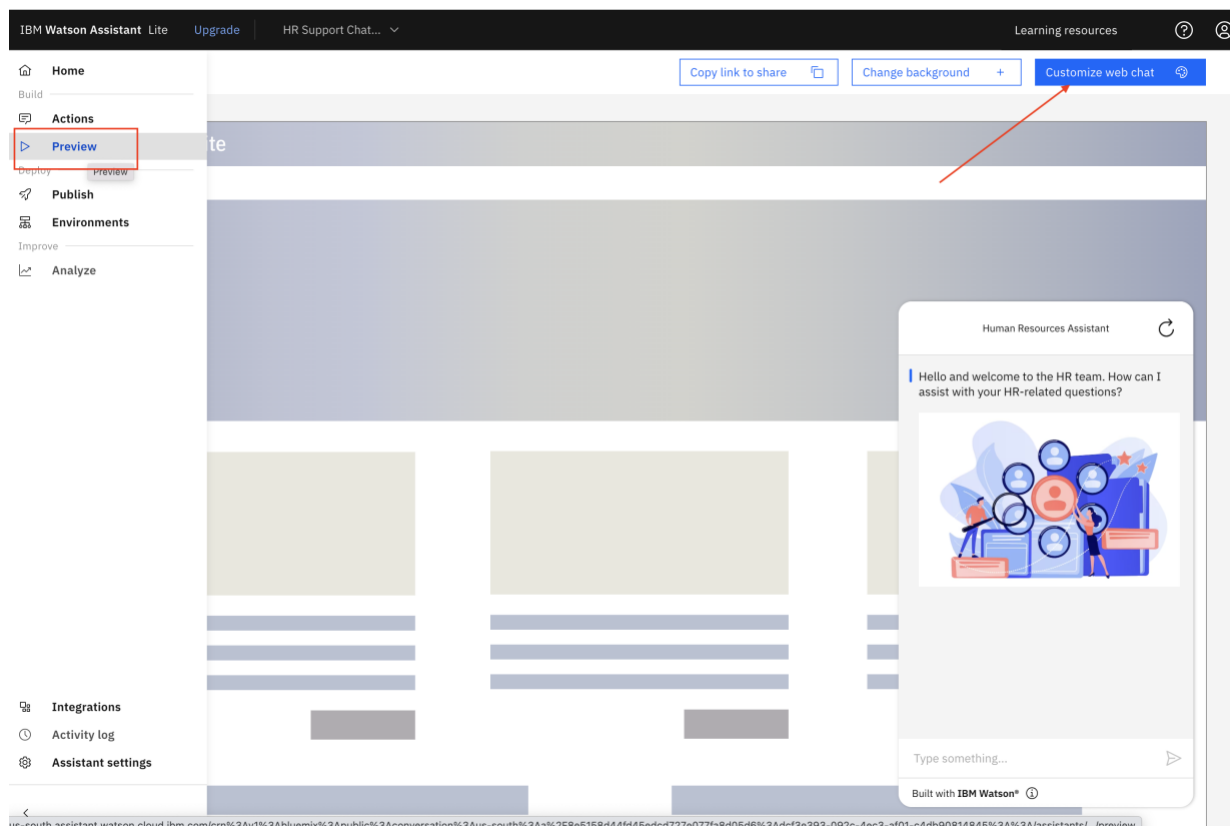
13. It's time to test the dialog box. Open the **Preview**.
14. And start with this question: what programs do you have?



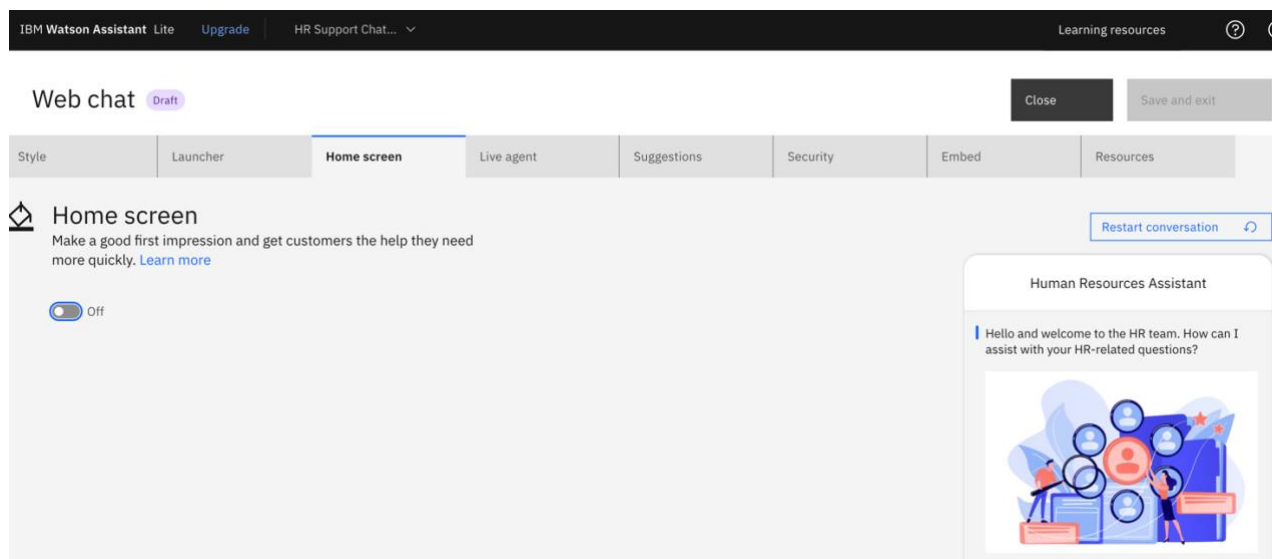
15. Select each of the options one at a time and carry out the conversation. You may find that you need to add more utterances or other constructs as you see fit to make your chatbot that much more engaging.

This effort is an on-going endeavor. You always update the conversation. And now you are ready to publish your chatbot.

16. Click **Preview** and click **Customize web chat**.

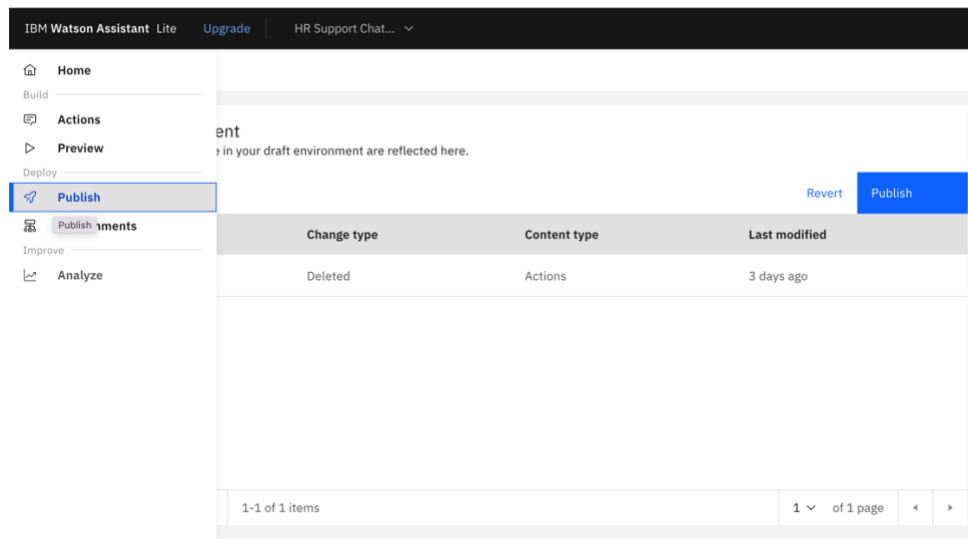


17. Select the **Home** screen tab and uncheck the default greetings message and set it to **off**. You are using your own web page in this example. While you are here, explore the other tabs. Think about how else you can bolster your chatbot. Next you publish it so we can obtain a URL and pass that to friends and family for some stress test if you will.

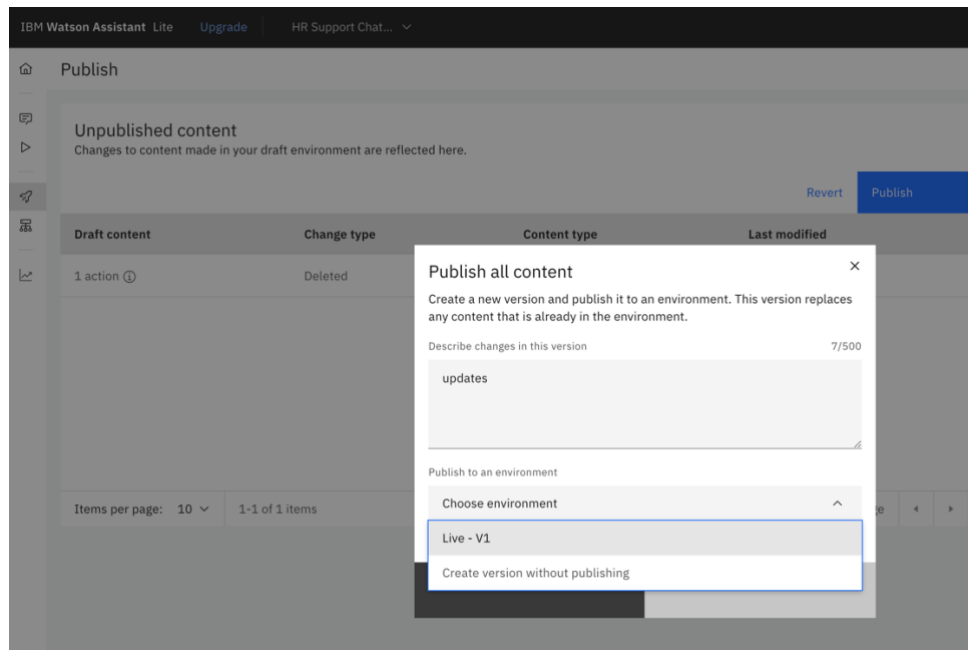


18. Save and exit.

19. Click the **Publish** link from the left pane and click the blue **Publish** button.

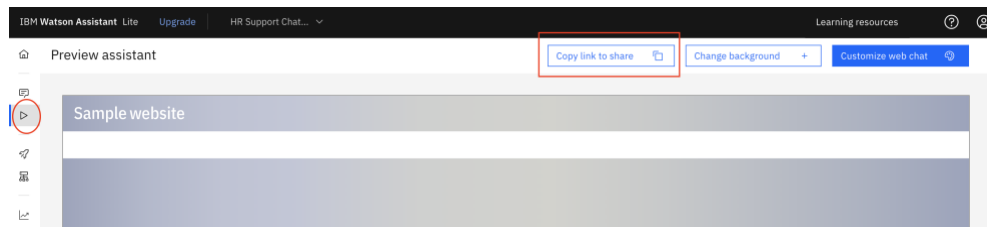


20. From the Choose environment drop-down list, select **Live** and click **Publish**.



21. Click the Publish icon in the left panel.

22. Click copy link to share.



Save your link and send it around for folks to test your chatbot and provide feedback fo

