Oracle Digital Assistant
The Complete Training

Planning for Your Digital Assistant Implementation

Safe Harbor Statement

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Topic agenda

1 ▶ Identify and enrol your team

2 ▶ Identify and assess potential use cases

3 ▶ Define a measurement plan

4 ▶ Set stakeholder expectations

5 ▶ Define an escalation strategy

6 ▶ Define post-launch chatbot monitoring and optimization plan

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The digital assistant project team

- Perhaps one of the most consequential decisions – "who will work this?"

- Successful new core teams:
  - Have a few, empowered, cross-functional, customer-focused team members
  - Embrace and celebrate a "try, succeed (or fail), learn, adapt, move-on" mindset
  - Are given freedom to experiment and are eager to show results.

- Should be engaged for the duration (at least one cycle)

- For most, it's the first time working on a chatbot

Key attributes of successful teams

Who

- Project manager

- Conversational designer

- Technology lead (integration)

- UX lead (tone, personality, UI)

- Business SME

What

- Accountable for project objectives (scope, time, cost, quality)

- Can get decisions made

- Not expert in all areas, but knowledgeable in most

- Share and embrace the vision

- Are interested in outcomes

- Must be present to win!

- Are able to "fail forward"

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Analyzing and selecting use cases – subjective assessment

- Why a conversational digital assistant?
  - What benefits and are there alternatives that will be perceived as equal (or better)?
- What's the overall project motivation?
  - Learn via pilot?
  - Reduce contacts and/or improve self-service?
  - Brand awareness, marketing?
- How and why will users be motivated to engage with it?
  - Simply putting an icon on a webpage is not enough
- How are you defining the chatbot's domain of coverage?
  - Does the end-user experience match business architecture?

Analyzing and selecting use cases – objective assessment

- What does the "question distribution curve" look like?
  - Preferable is few, high frequency questions w/long-tail of relatively infrequent questions
- What system integration is required?
  - Is it available? Is it feasible? How long will it take to develop?
- What channel will be used?
  - What is the level of effort to integrate with a given channel?
  - Note that different channels require different conversational design strategies
- What is potential ROI?

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Defining a measurement plan for your chatbot

- What does success look like?
  - Reduced contacts?
  - Lowered TTR?
  - Increased satisfaction?
  - Process optimization?
- How will you measure it?
  - Chatbot analytics?
  - External system tracking? (E.g., Service tickets?)
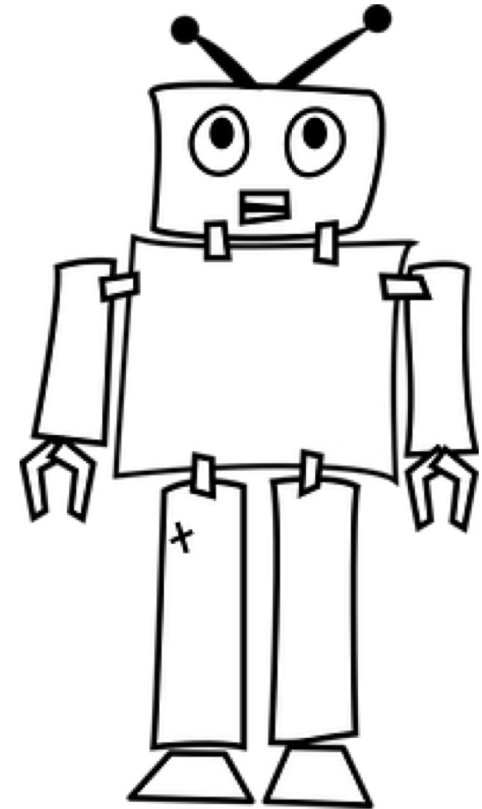- How will you compare it to status quo?
  - Vs. Human metrics or CSAT?

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Setting stakeholder expectations

- A chatbot alone will not fix underlying service/resource issues

- Chatbots make mistakes
  - More early on
  - Given a monitoring & tuning plan, the chatbot will NEVER make the same mistake twice.

- Like a human agent, a chatbot has a learning curve
  - Humans must be available to "teach" the chatbot
  - First 30 – 90 days should assume minimal progress against success factors
    - Performance will improve over time

Don't always blame the chatbot. Failures surfaced in the chatbot might be **failures in process** or the same failures a **human** would make

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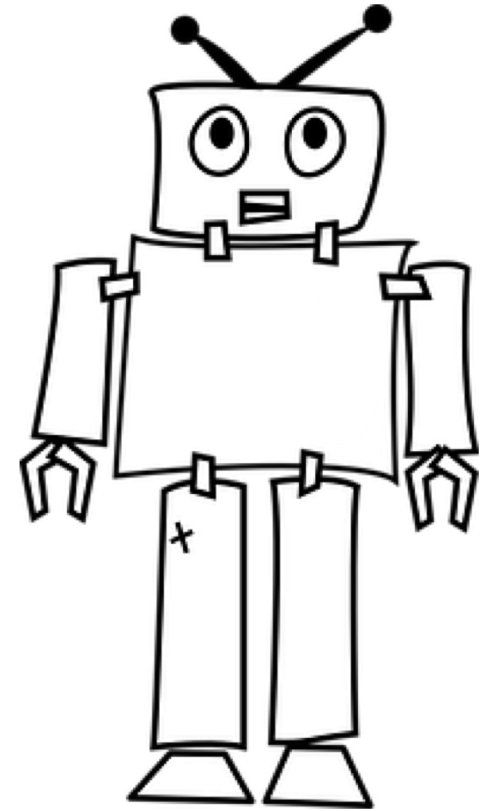# It's not "failing over", it's "telling you what to do next"

Escalation happens

- Even the best chatbots "get off track"
- Make it easy to "escalate" when user is confused/frustrated
- "the 1st day is the worst day"
- As your bot matures, you may "restrict" escalations
  - Let the data tell you how and when

Escalation options

- Live chat
- Offer a call or callback
- Email
- Redirect to other applications, support websites, knowledge repositories, FAQ's, etc.

When a chatbot hands off to a human it's not failure, it's an **opportunity to learn**.
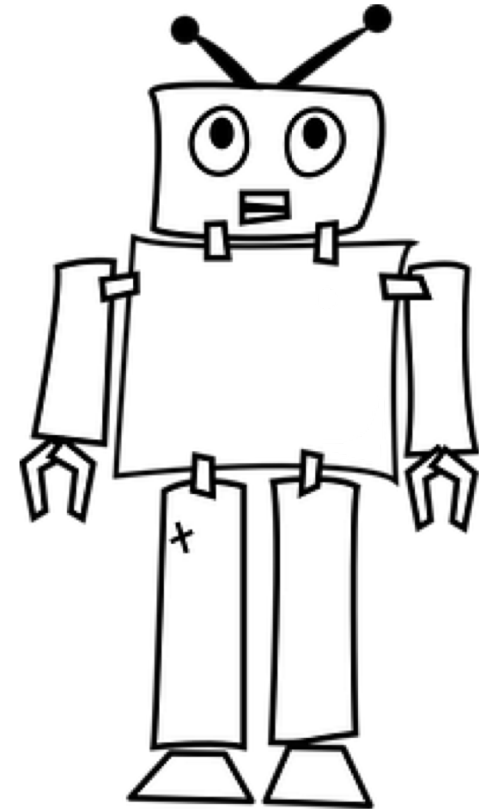
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How do you know if you've got it right?

"I can't define a 'good bot', but I know one when I see it…"

"How will we know when we're done?"

A ODA Report Card

Accessibility (Website)	Grade	Comments
Findability		Is bot easy to locate?
Format Fit to page		Does it fit style of page?

NLP Capabilities	Grade	Comments
About_Bot		What do you do?
About_Company		What does your company do?
Abuse		You suck

Accessibility (Website)	Grade	Comments
Findability		Is bot easy to locate?
Format Fit to page		Does it fit style of page?

User Interface (Web)	Grade	Comments
Color		Readability and accessibility
Font		Readability and accessibility
Frame		Fit to page and accessibility
Avatar		Appropriate
Greeting Message		Succinct. Sets proper expectations?
Menu/Capabilities		
Print		
Save		
Attachment		
Escalate		
Start Over		
Navigation buttons		
Yes/No Buttons		

Transactional Capability	Grade	Comments
Use of flows vs. forms		Interview? Form fill?
NLP support related to process?		Can I ask questions about the forms?
Entities recognized?		NER from utterances?
Help available?		What if I need help mid transaction?
Error conditions & messages		What if the API's break?

NLP Capabilities	Grade	Comments
About_Bot		What do you do?
About_Company		What does your company do?
Abuse		You suck
Answer_Bad		That answer didn't help me.
Answer_Good		That's great.
Escalation		I need to talk to a human
FAQ's		
Goodbye		TTFN or OK. I'm done
Greetings		Hi there
Help		I need help
I_am_Confused		I don't understand
Off_Topic		I want to talk to a man about a dog.
Out_of_Scope		Do you sell bitcoin?
Start_Over		Can we start again?
Typed menu commands		
What_Do_You_Do		What can you help me with?
Yes/No		Typing "yes", "y", "k", "ok", etc.
You_Are_Confused		You are confused

Performance Assessment	Grade	Comments
Accuracy		
Coverage		
Escalation		
Transactional		
Other		

Overall Assessment	Grade	Comments
"Don't make me think" design?		