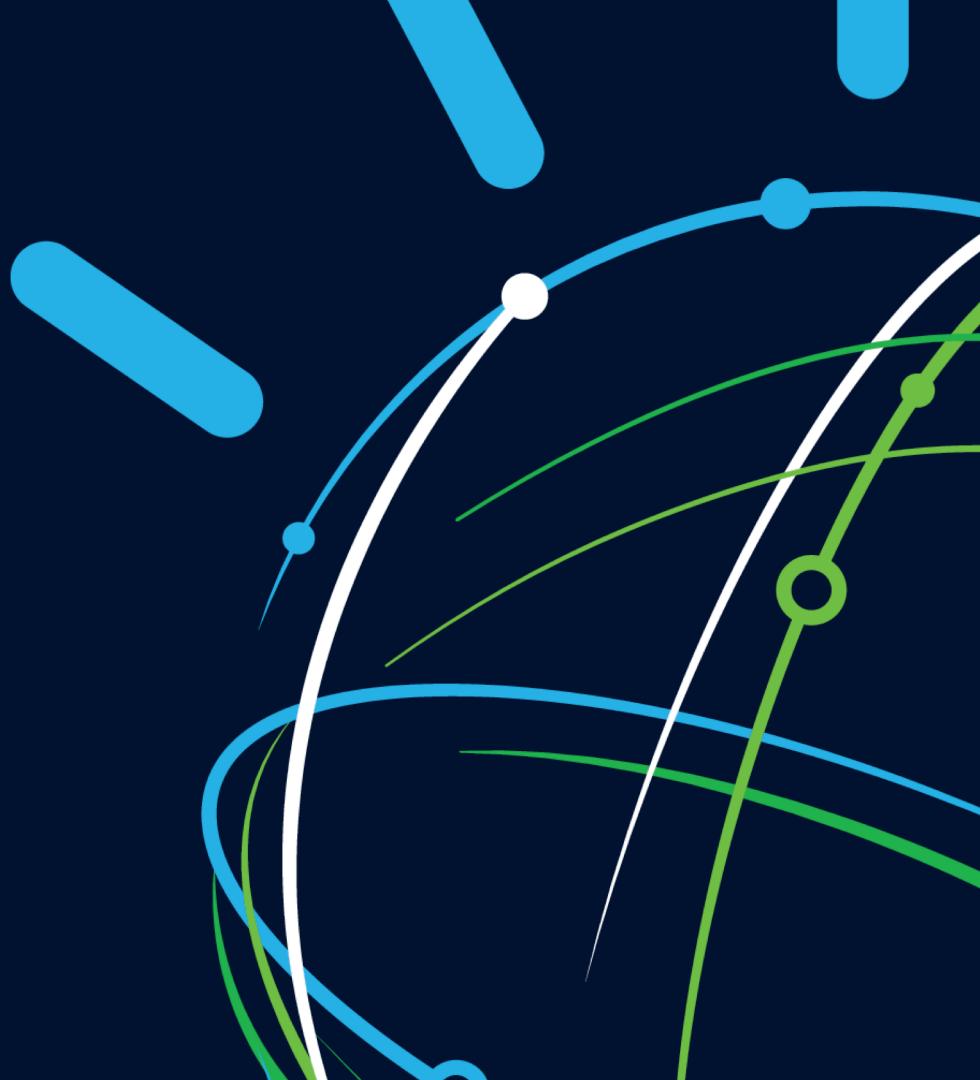


IBM Watson

# Designing Conversational Solutions

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## Introduction

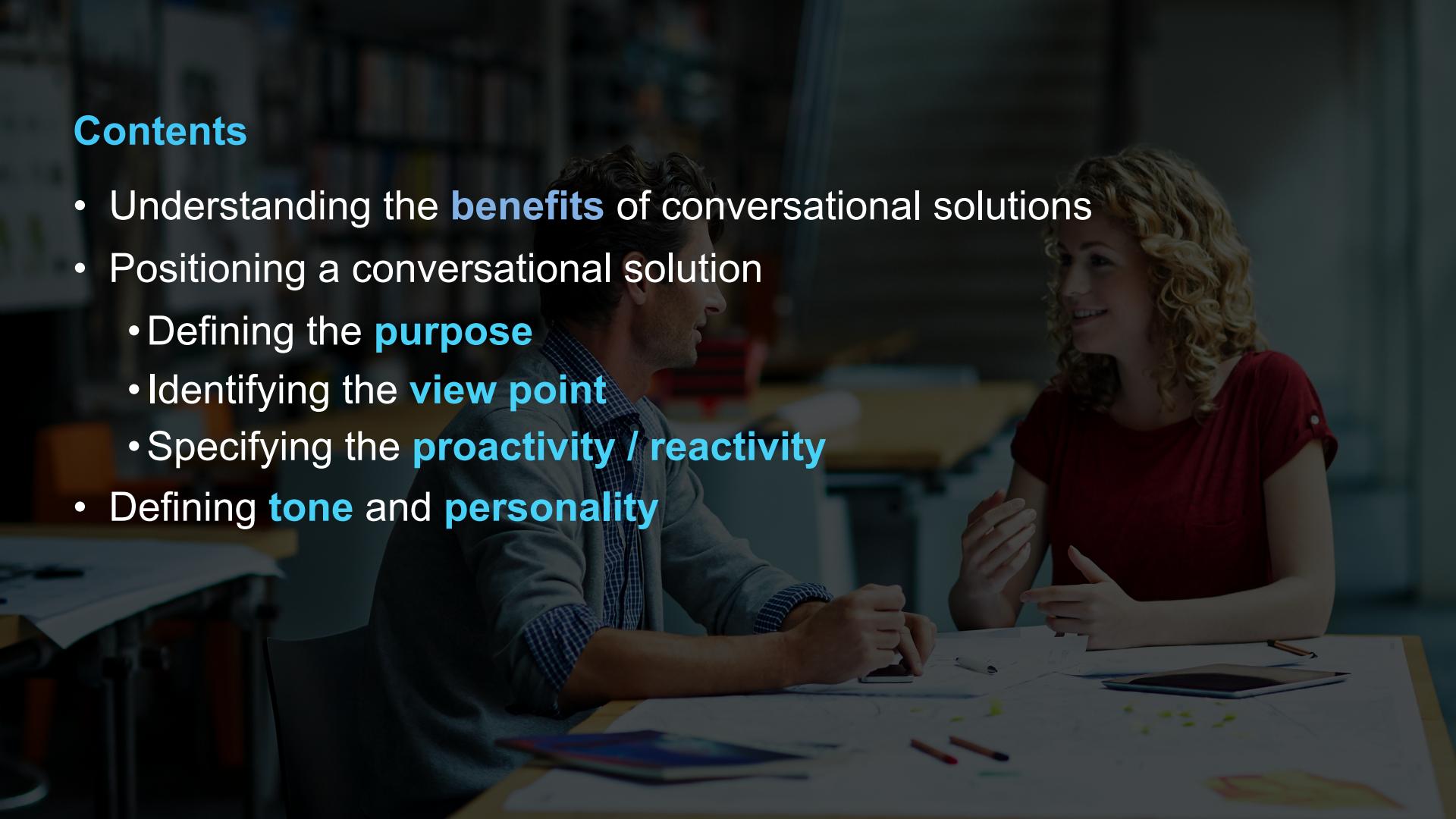
- Getting the conversation design right requires information, skills and expertise
- Designing effective and engaging conversational interaction that achieves your clients' aims can be harder than it seems
- It draws on skills other than 'hands on the keyboard' Dialog skills
  - Language skills
  - Strategic thinking
  - Deep knowledge of your client's business and their customers (the end user)
  - Psychological insights – how people interact conversational solutions (virtual assistants); how to establish trust and achieve behavior change

## Introduction

- How do we get the conversation design right?
  - Carefully designing key moments in the conversational interaction
  - Using ‘lean forward’ and ‘lean back’ behaviour in the right balance
    - Proactively engaging users at the right time with key messages and questions
  - Using the right language
  - Developing the right approach to ‘chit chat’
  - Leveraging profiling capability to
    - Keep track of things about the user and tailor the interaction to them
    - Gather key information about users’ interests, concerns, behaviors
  - Ensuring UI behaviour supports the conversational interaction
  - And so on ...

## Contents

- Understanding the **benefits** of conversational solutions
- Positioning a conversational solution
  - Defining the **purpose**
  - Identifying the **view point**
  - Specifying the **proactivity / reactivity**
- Defining **tone** and **personality**



## **Some of the benefits of good conversational interaction:**

- Improved communication
- Humanized interaction
- Engaging
- Persuasive
- Cool factor



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## What is ‘positioning’ ?

### Positioning a conversational solution involves ...

- Defining the **purpose** of the conversational solution – Job Description
- Identifying the **viewpoint** of the solution ...
  - Who is the solution is for? Who benefits from it?
  - Does the solution represent someone/something's interests?
  - what role should the solution adopt in relation to the end user?
  - where does the solution ‘sit’ in relation to the end user and the client ?
- Specifying how **proactive** (“lean forward”) and **reactive** (“lean back” the solution should be

**Positioning**, together with **tone** and **personality**,  
and UI behaviour, creates the ‘feel’ of the  
**overall** solution for the end user

Getting the **positioning** right is **KEY** to  
the success of a conversational solution

Conversational solutions should have a  
clear purpose,  
a well-defined job to do

## Defining the purpose

1. Think about the role of conversational interaction
  - Why do you need to engage in chit chat?
    - To make the solution **seem more human-like, engaging**
    - To make the solution **look more intelligent**
  - Why do you want Watson to walk users through a **complex process**?
    - To help **facilitate understanding** by clarifying the user's questions
    - To **guide users** to information that we want them to have
    - To **help users** complete a process that we want them to complete
  - Why do you want Watson to have a **personality**, to be able to say “Hi”?
    - To **humanise the interaction**, to create a more user-friendly experience for the end-user
  - Why do you want to **personalise** the conversation?
    - To help users feel as though the conversation is **tailored to them**; possibly to show that the solution remembers the user

## Defining the purpose

2. What do you want to achieve by using Watson?
  - To **reduce costs** by the number of calls to the call centre and call handling times  
... and/or
  - To **attract new target segments** ... and/or
  - To **impress potential users** and be seen as innovative and future-focused  
... and/or
  - To **increase loyalty and user engagement** with their brand

To address the client's needs and deliver real value, the solution needs to do **more** than welcome the user, answer questions, and engage in some chat chat

It's important to have a **clear** and **thorough** understanding of the purposes of your conversational solution

## About your Goals – questions to ask

- What are the problems you want to solve with this Watson implementation?
- What are some of the other pain points your organisation is experiencing that Watson might be able to help with?
- What do you want to achieve with Watson – with this implementation, and in the future?

## About your target end users – questions to ask

- Who are the target end users – of this implementation, and in the future?
- What do you want the end user to do / What actions do you want them to take?
- What is the nature of your relationship with the target end users?
  - Are you provider of products and services?
  - Are you an education provider?
  - Are you an authority / government body?
- What are the end user's pain points? What would make their relationship with you easier?
- What would increase their loyalty to your organisation?
- What would encourage them to take the actions you want them to take?

## About the Watson implementation – questions to ask

- Is there a specific job – or jobs – that Watson needs to do? E.g.
  - Encourage the user to complete an online form or process
  - Persuade the user to purchase a product or service
  - Prequalify the user for something
  - Engage the user and generate interest in something
  - Educate or inform the user
  - Entertain the user

Explicitly defining the purpose will help you  
design a coherent solution that  
meets **your needs** and the needs of your **end users**

Viewpoint is the role the solution should adopt  
in relation to the end user –  
where the solution ‘sits’ in relation to  
the end user and the client ...

It's vital to correctly identify the viewpoint that  
the solution should have

The wrong viewpoint is jarring for end users –  
at worst, it undermines the purpose  
of the solution

## Identifying the viewpoint – questions to ask

Who is the solution acting on behalf of?

- Your organisation, as the organisation itself
- Your organisation, as an employee or representative of the organisation
- Your organisation, as a partially-independent spokesperson
- Your organisation, as an advocate for the end user
- As a completely independent entity

## Identifying the viewpoint – questions to ask

What **role** should the solution play in the relationship between your organisation and your end users?

Should Watson present as:

- an **employee** who speaks on behalf of your organisation, and is completely aligned with the your organisation's interests?
- **partially independent** of your organisation, knowledgeable about your business, but able to give the end user impartial information?
- an **advocate** or **friend** to the end user, able to access your organisation's information to help the user?
- **completely independent** of your organisation, acting solely in the interests of the end user?

## Identifying the viewpoint – questions to ask

What relationship should the solution have with the end user (to achieve the purpose of the solution)?

- Helper, guide, assistant
- Coach, motivator
- Companion, conversationalist
- Regulator, enforcer
- Salesperson
- Friend, fellow-traveller
- Teacher
- Entertainer

## Identifying the viewpoint

### HINT

- Does your solution need to actively generate revenue?
  - E.g. Explicitly sell a product or service
- Does your solution need to actively promote something?
  - E.g. Actively promote an organization, an event, a location, a creative property
- Does your solution need to actively persuade?

## Identifying the viewpoint

### *Examples*

- **Deakin University**
  - Partially-independent assistant / student peer, supporting the student to navigate University information and processes
- **UniCredit prototype**
  - Customer advocate / Employee AND Assistant / Employee, supporting both bank customer and branch manager
- **Swiss Re prototype**
  - Independent adviser raising awareness of the value of life insurance

Proactivity is the degree to which the solution proactively engages and guides the user, rather than reactively sitting back and waiting for the user to ask a question

## Specifying proactivity

- **Reactive**
  - Apart from a welcome message (and perhaps one or two other statements) the solution ‘sits back’ and waits for the user to ask a question
  - It does not proactively prompt, encourage, suggest, guide, elicit
- **Proactive**
  - The solution reaches out to the user asking questions, offering information and choices, and guiding the user through processes
- **Combination proactive / reactive**
  - In specific circumstances, the solution reaches out to the user, asking questions and guiding the user through processes
  - At other times it sits back and waits for the user to ask questions

## Specifying proactivity

- The amount and nature of proactivity, and the circumstances in which the solution is proactive, will be determined by a number of factors
  - Purpose
    - If the solution is there to actively sell or persuade, there's no point waiting for the user to ask just the right question to initiate the sales conversation
    - If the solution is there to helpfully answer questions when asked, proactively reaching out to users to prompt them to ask a question can get annoying
  - Viewpoint
    - If the solution is supposed to be an independent third-party supporting the user, then a highly proactive solution that drives the interests of the client will break the end user's trust

## Specifying proactivity

### *Examples*

#### • Deakin University

- Current: Proactive only when the student needs to be guided through a complex process
- Future: Proactively engages students in general conversation about how their studies are progressing; proactively engages students needing additional support; proactively follows based on previous conversations

#### • Barclays Bank

- Proactively ‘pops up’ at strategic points during users’ completion of an online form, providing information on progress and next steps, and explaining outcomes

Together, purpose, viewpoint and proactivity  
help ensure a consistent and coherent user experience,  
which in turn  
encourages trust, confidence and engagement

The **tone** and **personality**  
of your Watson implementation will have an impact  
on how successful it is

## What is Tone and personality?

- Tone and personality is the ‘voice’ the solution ‘speaks’ in
- Don’t confuse Tone and personality with Viewpoint – which *is position* that the solution speaks from
  - Tone and personality should be consistent with Viewpoint, but
  - Viewpoint alone does not determine Tone and personality
  - For example, a solution may the Viewpoint of an employee of the client, but the tone and personality can be
    - Informal and friendly – “*Hi there, how can I help you?*”
    - More formal, still friendly – “*Good morning. How may I help you today*”
    - Formal, not very friendly – “*Hello. How may I assist you with your enquiries?*”

## Determining Tone and personality

- All verbal expression has a tone
- All conversation is with ‘someone’
  - If you add conversational elements to a solution, you’re engaging the user in human-like conversation
  - People are attuned to detecting tone and personality in human-like conversation – if you don’t explicitly determine the tone and personality, users are left to find it for themselves
  - If you try to write in a very neutral tone, to avoid addressing the question of tone and personality, users will still perceive a tone and personality – and it will be cold and unfriendly

## Impact of Tone and personality

Compare the impression / impact created by the following statements ...

*Hi, I'm Sam – it's great to meet you David! Got a question about ABC Bank? Just ask away!*

*Hello, I'm Sam, ABC Bank's virtual assistant. May I call you David? [Yes] Thanks David. I'm here to help you with questions about ABC Bank. How can I help you today?*

*Good afternoon. I'm Sam, ABC Bank's virtual assistant. I can answer questions you may have about our products and services. Please let me know if I can assist you.*

## Factors to consider in Tone and personality

Ensuring compatibility with the client's brand

Supporting the Purpose

Reflecting the Viewpoint

Considering Proactivity

Target audience

Tone of other content sources used by the solution

The nature of specific questions and responses

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**Let's get started !**