CASE 2 Support Chatbot

Support at Your Fingertips

The challenge

Support agents were overwhelmed with answering common support problems rather than addressing complex IT issues. What if you could just ask those simple questions 24/7 on your phone? I was tasked to help the team complete discovery and launch the chatbot.

Video: escalation entry, in person

Determining the voice and personality

I designed and led multiple workshops with the team and product owner to determine the tone, voice, and personality of the chatbot. Aligning everyone on shared goals, road map, and features.

I guided the team through activities for conversational design to define scope and assess technical feasibility.

A style guide, tailored to Slack, was developed through interviews and collaboration with the content team.

To ensure precise formatting for developers, I utilized Slack Block Kit.

How do you measure success?

My initial hypothesis was to keep the conversation as short as possible, focusing on concise instructions. To test this, I began by asking users to **recall** the last time IBMers had to reach out for help.

RESEARCH PLAN

- Did you notice the time between messages?
- What was day to day like with Slack? How do you use during your work day?
- If an applicant was not working, how do you typically resolve it?
  - How would you do that with the Slackbot?
- If you need to reset your password how would you typically resolve it?
  - How would you do that with the Slackbot?
- What would you typically do if you need support from a live HelpdeskAgent?
  - How would you do that with the Slackbot?

INSIGHTS

- All users said their app usage experience in Slack is limited to notifications and slash command such as /jokes
- User prefers searching internal site and asking a colleague. Since search exhaustively they want a real person
- Users would prefer having a greeting when they opened the app. They all were able to interact with /help and like to know what the bot can help them with.
- Experiences for the app varied from 1 yr ago help with anything to just help with "IT" support terms, which the user thought was a generic term.
- App installation was painful, all users would prefer that it was already installed.

Breakthrough insight

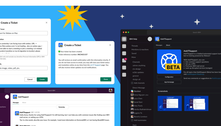
My interviews revealed a major flaw with the current prototype. It could not solve this user's issue.

Illustration by Ian Walker from IT's Virtual Support highlighting the issue

> I couldn't get into anything… could not access email, everything was broken, could not get pass the log in on mac computer. **I only had slack on my phone.** I do [have Mass], it's sporty, it was 50%, I slacked a guy I worked with [for IBM phone number], I was totally locked out of my computer. It took 4 hours. It was horrible. They asked me for my serial number (she didn't know it). Then asked for my Slack name and sent me instructions.

Continuous user research and conversation improvements

I benchmarked our effectiveness by evaluating the bot's capability to solve a "hardest" simple IT problem just on a phone, comparable to an advisor sending a detailed solution in a single long Slack message.



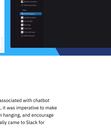
Research insights and opportunities

Given the negative to neutral sentiment associated with chatbot assistance at that time (before ChatGPT), it was imperative to make it easy for users to try, avoid leaving them hanging, and encourage usage through a feature that users naturally came to Slack for information.

> I probably wouldn't use it unless it was already installed, in a channel or in my workspace, and someone said you can just ask the bot, it was just enabled for everyone.

Collaborating with the technical team, we devised a temporary solution, allowing users to try it immediately for the launch.

Outages I observed was a common question on Slack. This feature would be usable on a day-to-day basis rather than just for emergencies.



I came up with a hybrid search to address gaps in information while the content team continued to expand the corpus.

The beta launch and working around roadblocks

I worked closely with the content team to create installation instructions as we found a long-term solution for having the app permanently installed.

Feedback was given on weekly updates with the team

I designed multiple launch points across the support site.

I coordinated with multiple teams, including the IT site, technical team, and homepage team, to synchronize various launches.