



TIPSHEET

The do's and don'ts of chatbot design

Maximizing agent efficiency and customer experiences

Introduction

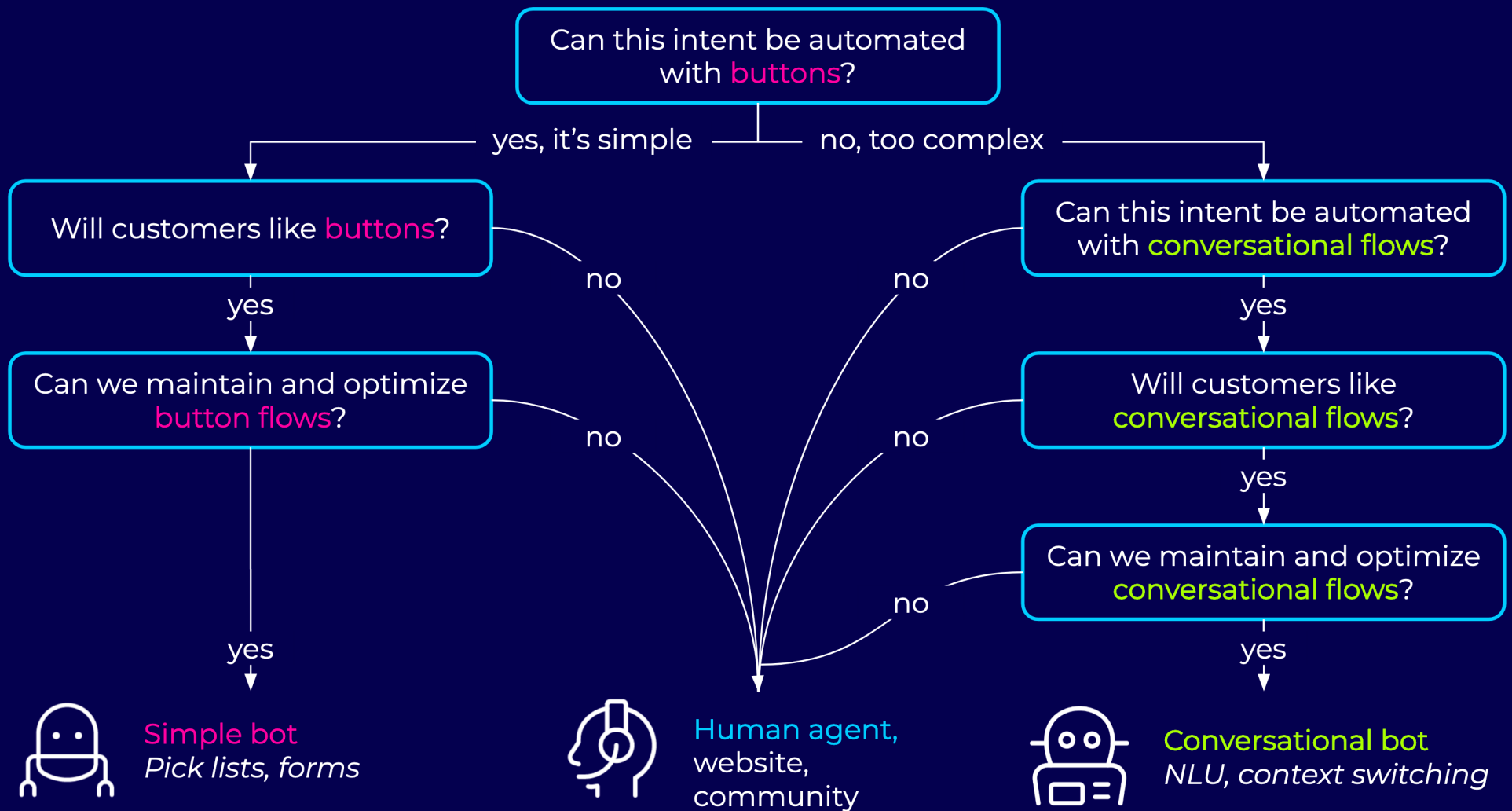
65% of consumers think that chatbots are slower and less accurate than human agents, but more than half don't care if they talk to a human or bot as long as they get the help they need. Brands rely on bots to do too much, and many don't understand which conversations are best suited for bots, and which are best suited for humans.

To decide whether to use simple button bots, fully conversational bots, or human agents — ask these three questions:

- Can the conversation be automated with buttons, or does it require natural language?
- Will customers like it?
- Can we maintain it?



An effective bot should be a tool to getting faster, more accurate help — not a barrier. Here are a few simple do's and don'ts to create positive and efficient interactions for your customers and agents.



Do:

WELCOME USERS AND SET EXPECTATIONS

Your conversation design and chatbot flows are an extension of your brand and part of the customer experience. Welcome your customer and set expectations on response time. These messages can be personalized based on the user, location, or other criteria. Provide information about the types of requests your chatbots can assist with, or recommend other ways to contact your brand. It is equally important to let users know what your chatbots can't do, as what they can do.

TAKE ADVANTAGE OF RICH MESSAGING FEATURES

Rich messaging channels such as Google's Business Messages, WhatsApp, Facebook Messenger, and Apple Business Chat, let you create powerful user experiences by serving more than just text. Use cards to deliver images, links, videos, product catalogs, and maps to make the conversation more engaging.

USE A BLEND OF BUTTONS AND NATURAL LANGUAGE

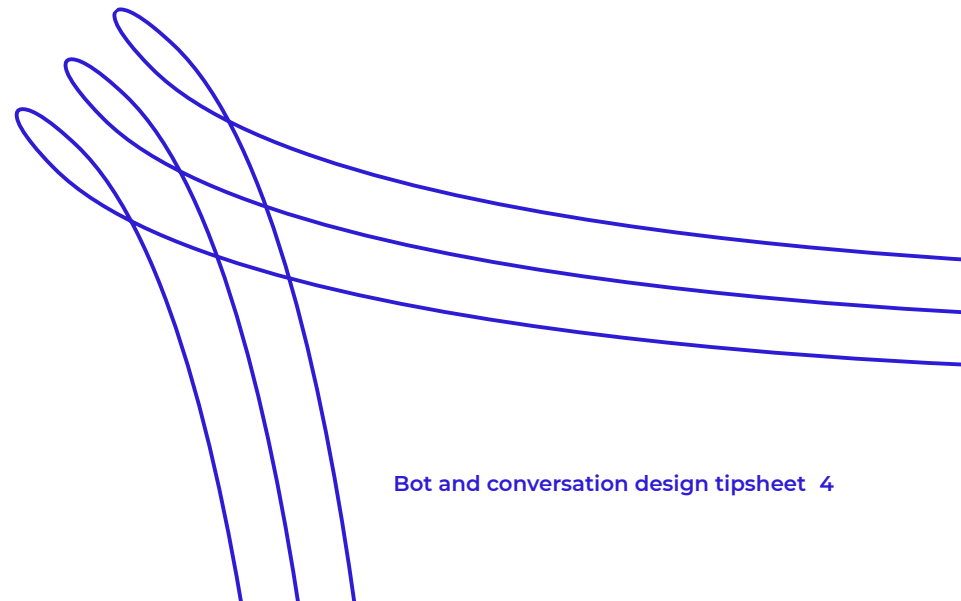
While buttons are perfect for helping people make easy decisions or guiding them quickly to solutions for your most common interactions, flows made entirely from buttons can feel limiting and tedious. A hybrid approach that offers a mix of buttons and natural language makes your flow easier to navigate, helps resolve customer needs faster, and offers a better user experience.

MAKE IT EASY TO REACH A HUMAN AGENT

A majority of customers prefer to limit chatbot interactions. Offer buttons to reach agents and identify the common phrases customers type when they want to chat with a person. Conversations may begin with a chatbot, then be handed to an agent, and then reintroduce a chatbot to automate a predictable process. These handoffs should be seamless and ensure that an agent can be reached when needed.

KEEP YOUR BUSINESS MODEL IN MIND

Create flows to support the most common, repeatable interactions you have with your customers. Evaluate your team's capacity and only take as many conversations as you can support. By throttling your channels up and down, you can keep agents active and avoid overwhelming your systems or delivering poor user experiences.



Don't:

PRETEND YOUR CHATBOT IS A HUMAN

29% of consumers say they sometimes struggle to identify whether they are talking to a chatbot or a human agent. Make it clear when they are chatting with a bot and set expectations on how they should interact with it in your welcome bot flow.

SET IT AND FORGET IT

As your business and your customers' needs change, so should your chatbot flows. Review common phrases your customers are typing and any new phrases or intents they're engaging with to improve button options. Use artificial intelligence (AI) and machine learning (ML) to improve responses as new patterns emerge.

SEND TEXT WALLS OR OFFER TOO MANY BUTTON CHOICES

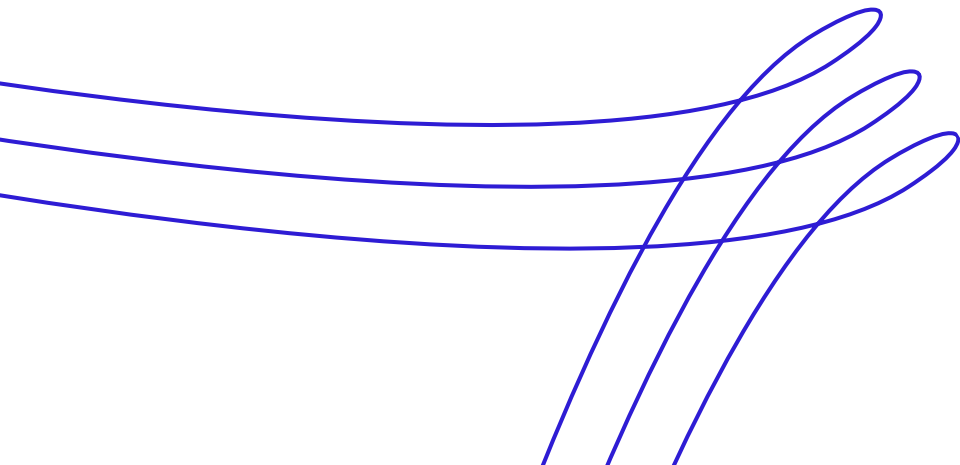
Large blocks of text or too many button options may frustrate users. Keep responses simple and relevant. Presenting information and options that are easy to navigate leads to quicker resolutions and higher customer satisfaction.

CREATE LONG, BUTTON-BASED FLOWS

It's tempting to create flows that offer a limited set of choices, but customer needs often fall outside of those preset options. Keeping the user locked in long, button-based flows makes for a poor customer experience. Incorporate conversational chatbot flows with intent recognition that can support a variety of customer inquiries. This allows customers to use natural language to type in common requests and jump to the part of the flow that is most helpful to them.

RELY ON BOTS ALONE

53% of consumers don't care whether a chatbot or a human agent is interacting with them, as long as they get the answer or help they need. But, that doesn't mean that conversations should always be automated. Plan for the unknown and incorporate fallbacks and fail-safes to detect dissatisfaction and route the conversation to the appropriate agent to assist them.



Bot use cases

Both conversational and simple bots can be used to assist your customers. These can be configured in an infinite number of ways. Here are some of the most common bot types.

AGENT ASSISTANT BOTS: Recommend responses to agents using AI/ML. Automate predictable, repetitive tasks like gathering account information.

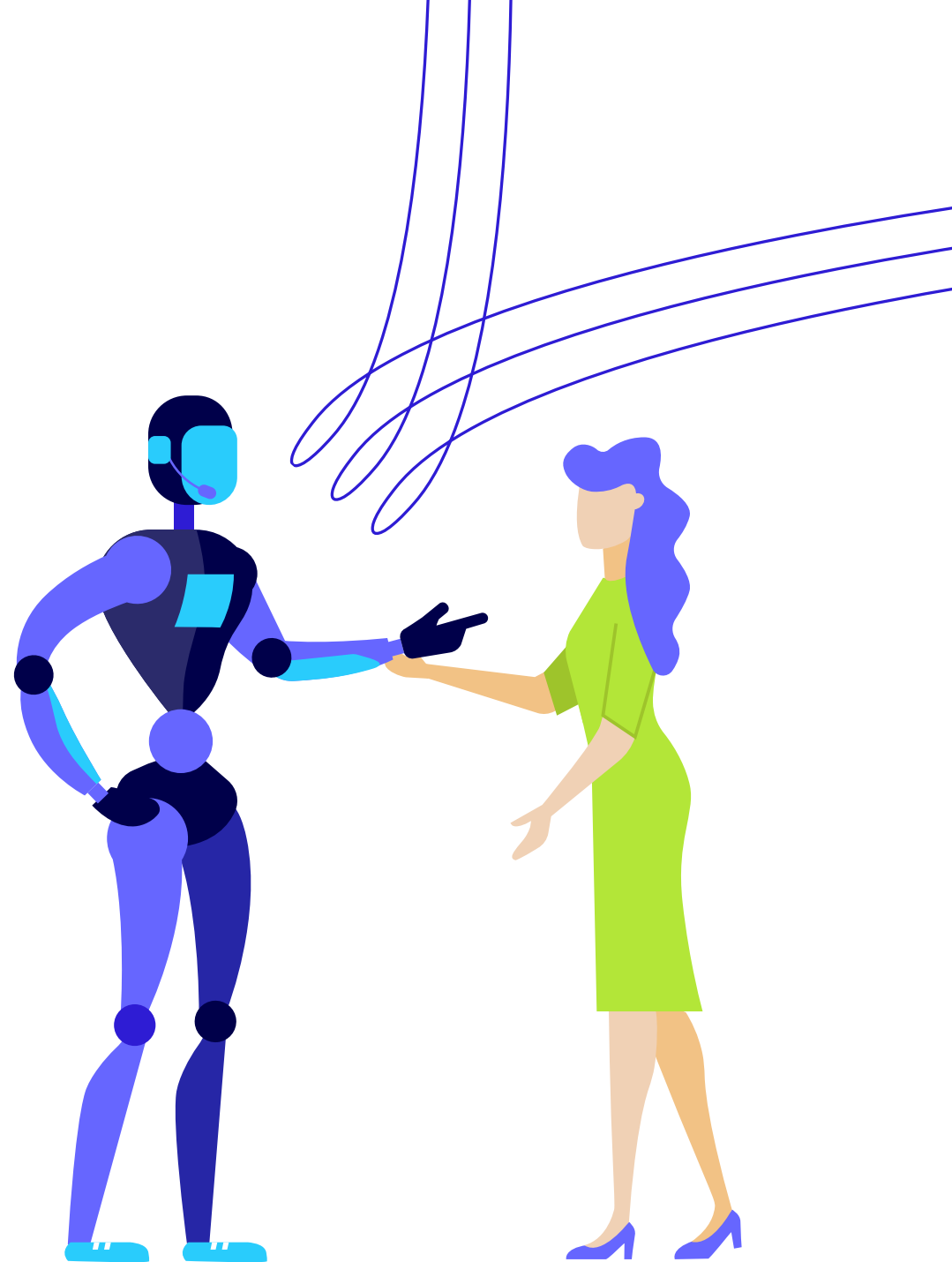
FAQ BOTS: Resolve commonly asked questions without involving an agent.

LEAD GEN BOTS: Route users to relevant information and questions to qualify leads. May schedule appointments with sales or automate price quoting.

ROUTING BOTS: Identify the type of inquiry and route it to the appropriate agent or self-service resource.

SALES BOTS: Perform e-commerce functions like order management, upselling, and payment processing.

WELCOME BOTS: Open the conversation and set expectations on response time or bot capabilities. Messages can be personalized based on the user, location, or other criteria.



Terms and definitions

CARDS: Visual elements served in the chat window. Can include pictures, videos, maps, ecommerce, etc.

CHIPS AND BUTTONS: Clickable reply options in a bot conversation. Also known as smart replies, fast replies, quick replies, or suggested replies.

FAIL-SAFES: Processes to identify automation failure and route conversation to human agents to step in and handle the conversation.

FALLBACKS: Messages triggered when the chatbot can't determine the user's intent or needs. For example, "Can you say that in a different way?" or "Did that answer your question?"

FLows/DECISION TREES: Similar to IVR (interactive voice response) on voice channels, these are the roadmap for leading customers to the answers they need.

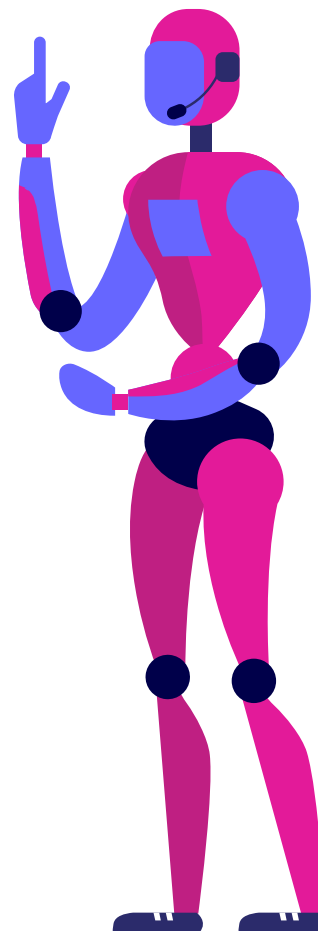
HANDOFF: Passing a conversation between agents and chatbots. This may happen multiple times during a customer interaction.

NATURAL LANGUAGE GENERATION (NLG): Allows the system to respond back by converting data into human language.

NATURAL LANGUAGE PROCESSING (NLP): Recognizes text inputs and freeform language to determine the next appropriate action to take.

NATURAL LANGUAGE UNDERSTANDING (NLU): Converts freeform language — including spelling errors, colloquialisms, and varied word choices — into inputs that the system can recognize.

THROTTLING: Adjusting the volume of conversations you allow to come into your system on a given channel.



How Khoros can help

With 2,000+ brands using Khoros, our software powers approximately 500 million digital interactions every day. From digital customer care and messaging to social media and online communities, Khoros helps companies authentically connect with customers throughout their journey.

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