

ORACLE®

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?



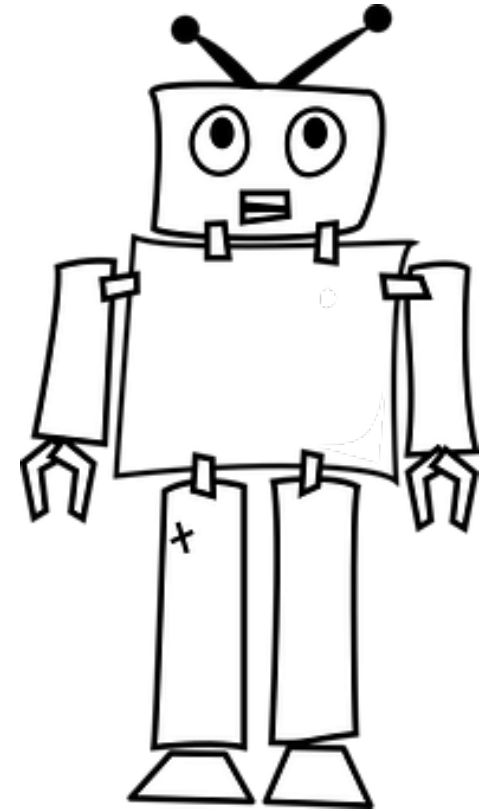
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Setting stakeholder expectations

- 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”

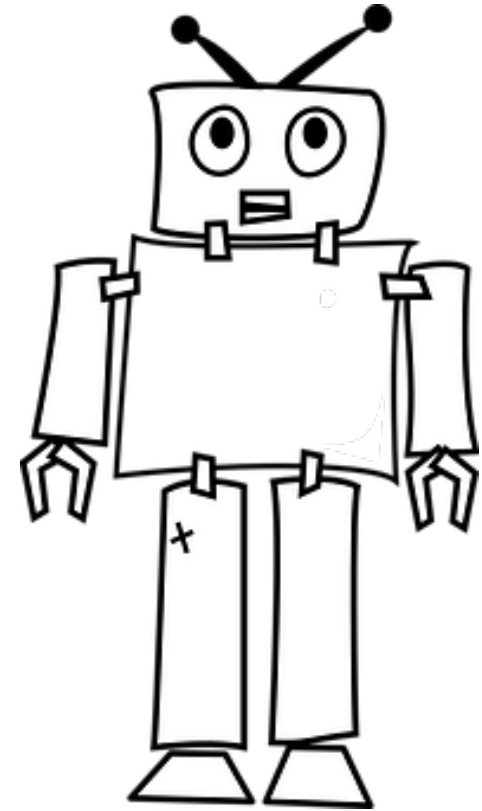
Escalation happens

- 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.**



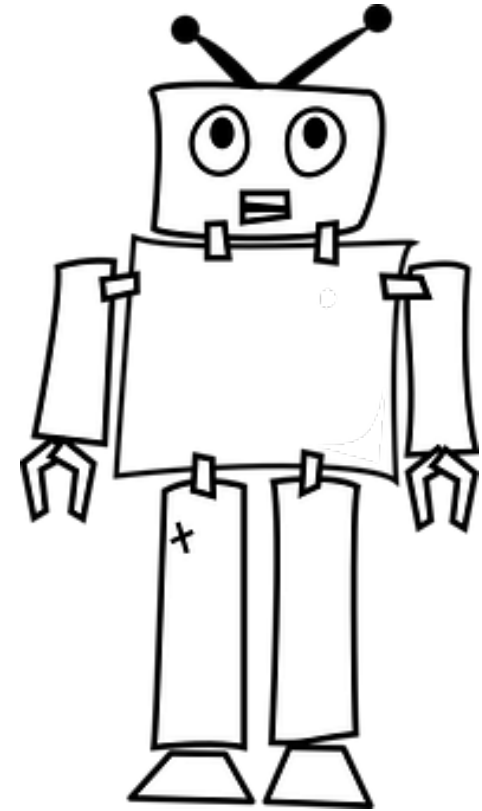
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How do you know if you've got it right?

"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

DIGITAL ASSISTANT 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?				

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