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Conversational design

Once you understand the core conversational concepts, it is time to start building your conversations and creating a dialog flow that makes sense to your customers. This episode will review the 6 steps to success for conversational design, and pitfalls to avoid when building your conversational solution.

Subchapters

Steps to success with conversational design
Pitfalls to avoid when building your solution

6 steps to success with conversational design

1. Question Collection and Understanding Utterances

- Focus on frequently asked questions, not what you anticipate your user's answers to be. Resist the urge to moderate your end users utterances, so that your system can learn exactly how your end users interact.
- Collect questions that are representative of the ideal user scenario for your solution.
- Iterate on your defined use case. Make sure that you're testing the quality of the experience throughout the journey and making changes as necessary.
- Plan for human error. Your users will use short hand, slang and acronyms, Don't adjust for this, as your system needs to understand exactly how your customers will speak.

2. Ground Truth mapping and intent clustering

The success of your solution depends on training the system with well-defined intents formed by clustering representative questions.

Intents

Definition Refresher

An intent is an action you want someone to take.

Tip

Make sure you have at least ten questions for each intent

Entities

Definition Refresher

The object you want to act upon which provides specific context for the intent

Tip

Use entities to provide exact matches for keywords and synonyms, or use as system event triggers using predefined event keywords sent from external applications.

3. Designing the dialog

Customizing the words, phrases, question and answers that your user will see in your experience.

Personality

Tone, language and attitude of your virtual agent.



Positioning

Defining the purpose, its job description

Proactivity

Will your solution steer the conversation or wait for the user to guide the experience?

Your data will also lean you towards whether your use case is short tail (FAQs) or long tail (reaching out to another source in order to provide an answer)

Create an exit strategy- help your users exit the chatbot when it's needed either through a human agent or by saying goodbye

4. Drafting the conversational flow

What are the steps you want your user to take? What is the end goal? What do you want them your users to achieve? Once you understand that, move on to the flow of the conversation.

— Starting the conversation

Welcome your users and tell them what kind of questions they can ask your solution.

— Guide your users through experience

Ex., Give them multiple choice answers to pick from

— Ending the conversation flow

Transfer your users to a human agent or help them to exit the conversational experience

5. Designing responses

When designing your responses, you want your interactions to be natural, adjust for tone, restate the intent, and have some variation in response types.

Make sure that answers are concise so that the end user can find answers quickly

Make the experience more human-like by interjecting chitchat or personality into your conversational solution

6. Continuous learning for your solution

The AI assistant should be monitored on a regular cycle, post-deployment, for the life of the solution. This will help identify new use cases that increase the value provided by the bot.

— Your solution must learn as your business develops. There may be updates to business process or legal compliance that you want to implement into your experience.

— Make updates from usage patterns. How your users interact will give you a lot of insight on how to update your solution.

— Use Iterative Teach Test and Calibrate (ITTC) to adjust your

virtual assistant experience based on kfold, blind testing or end user calibration.

Pitfalls to avoid

— Not leveraging representative data from your actual end users.

— Starting out too big. Make sure you start small, fail fast and iterate on the solution.

— Not establishing success criteria. Make sure you define KPIs early to solve a business problem.

— Overlooking the time required for learning and training. You have to make the time to iterate and train your solution.

— Lacking executive sponsorship, commitment and governance. You must have the right champions, vision, and right sponsorship to keep you on track.

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