



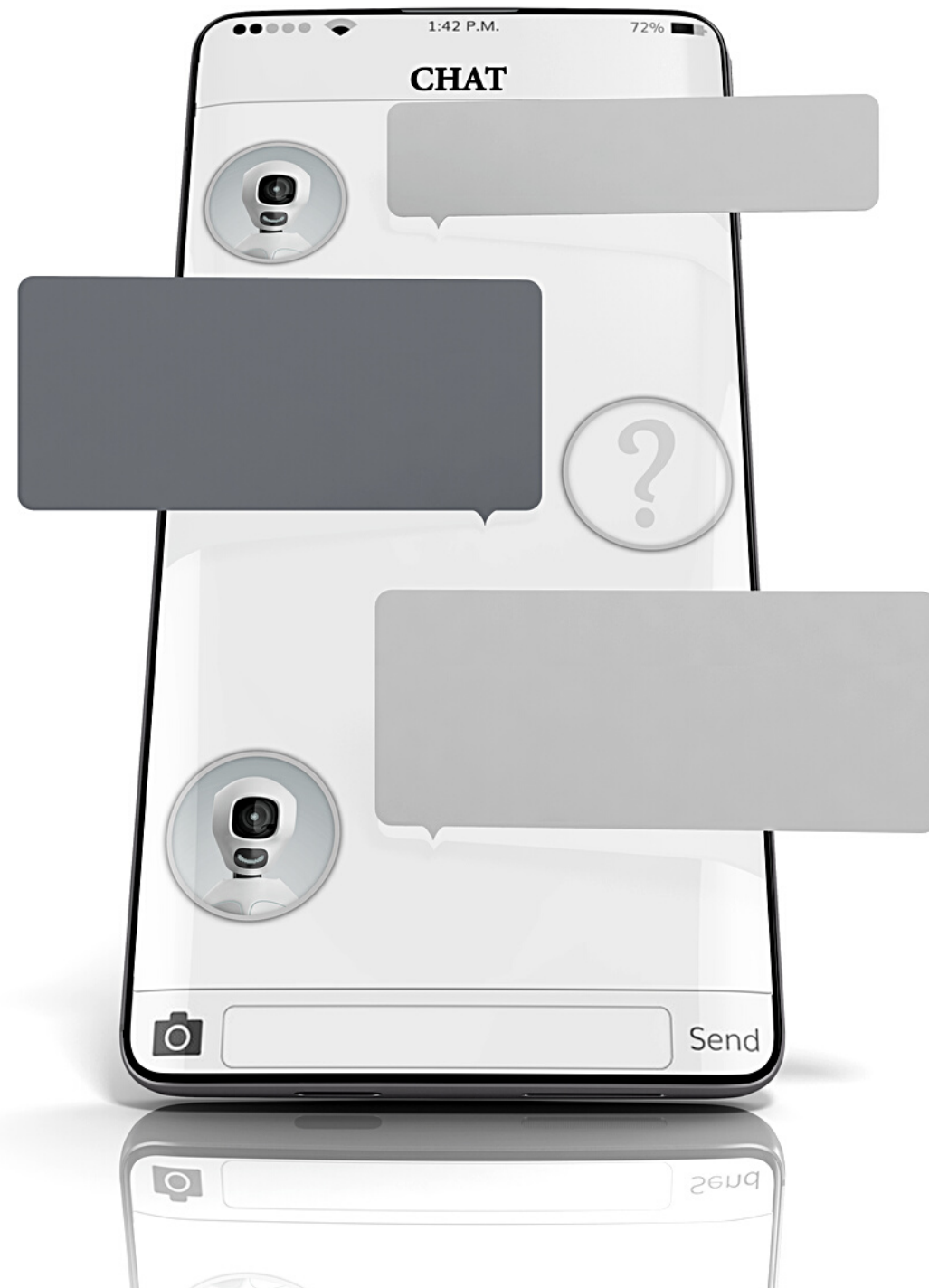
Quiq

Chatbot Workbook

Your getting started guide



Implementing a bot?



Do you have common or repetitive customer requests?

Are you experiencing spikes in contact requests, either unplanned or seasonal?

Would more efficient filtering, routing, and information gathering result in better experiences, customer support, and/or increased sales?

If the answer to any of these questions is "yes", then you've come to the right place. This workbook will step you through some of the important pre-work you'll want to do before your first bot design.

Stepping through this workbook will give you and Quiq the best opportunity to scope and configure your perfect bot. Let's get started.

PRE-BOT PRIMER

Decisions to make before
building your first bot

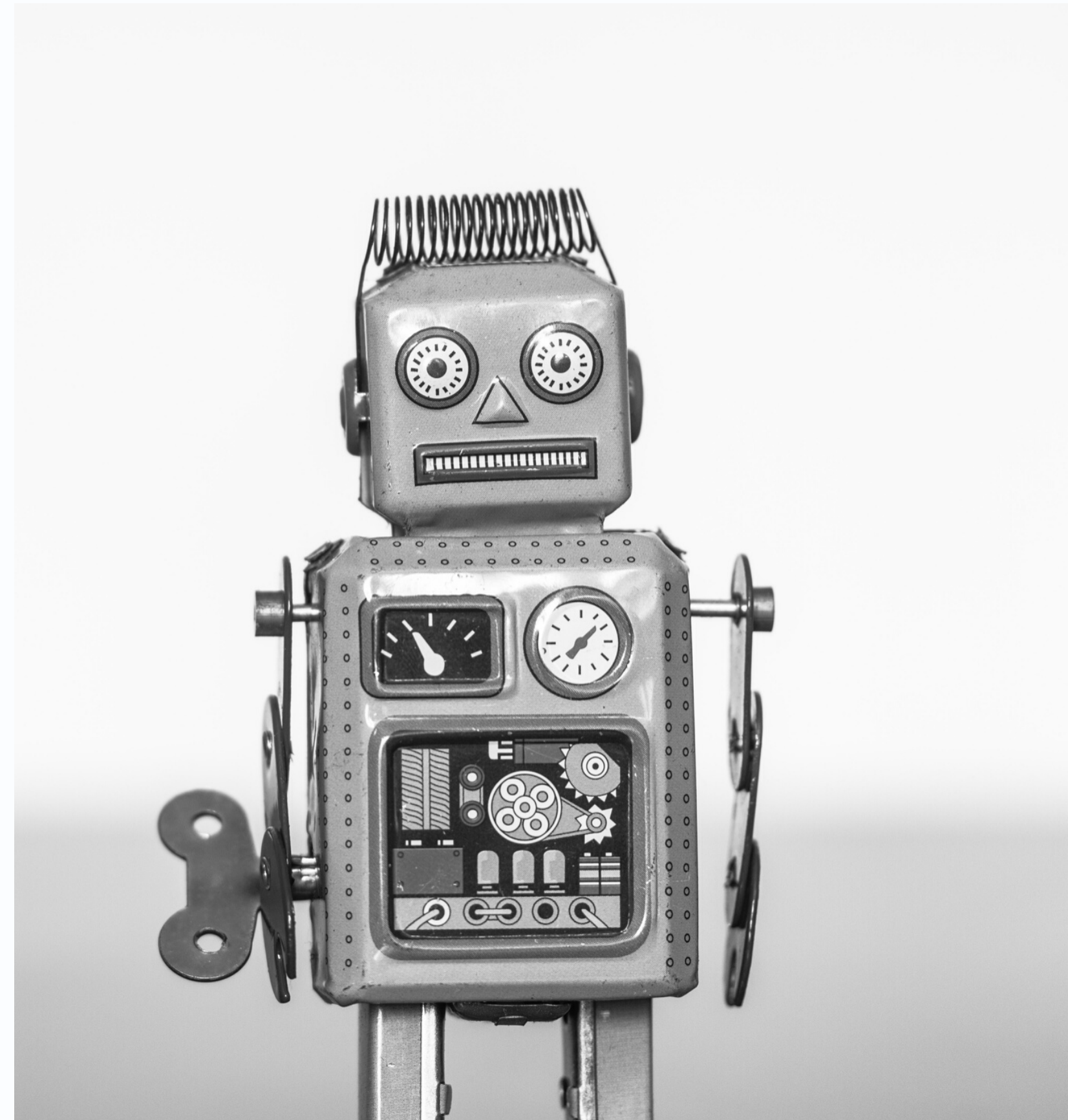


Before We Begin

Bots can come in all shapes, sizes and levels of complexity. They can also simply assist a human in resolving the customers needs, driving efficiency and satisfaction, or they can fully resolve the inquiry without any human intervention.

A bot can perform a basic function such as present an FAQ or collect a name and email address prior to routing your customer to the next available agent in a digital channel. In many cases, the bot can integrate to and call back-end systems and deliver back to the customer desired information, such as Order Status, Account Balances or Appointment Confirmations.

In preparation for understanding the level of effort and cost of your bot(s) build out, we ask that you consider the following questions and provide Quiq the answers.



Business Questionnaire

Bot Name: _____

Pro Tip: Make several copies of this page and fill one out for each bot you're designing.

Replacing an existing bot? ☐ Yes ☐ No

Do you have an internal resource who can “own” the bot project? ☐ Yes ☐ No

Name of bot owner: _____

Title: _____

What digital channels do you want your bot(s) to be a part of?

What do you see as the underlying business driver and benefit of having a bot(s) available to your customers?

What KPI's are you hoping to achieve?

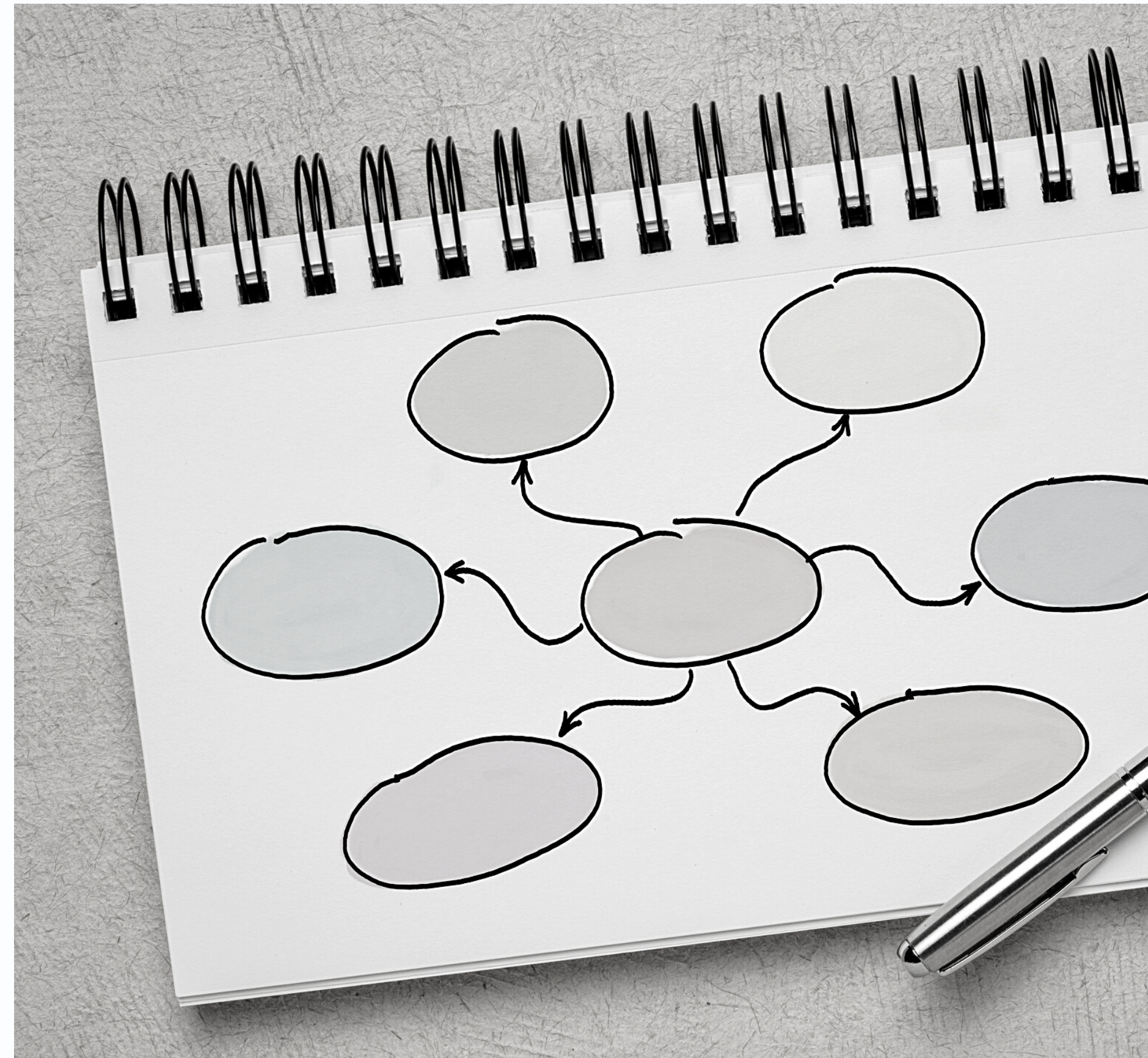
Is there a back-end system that you would like to integrate your bot to? ☐ Yes ☐ No

Name of system _____

Public API? ☐ Yes ☐ No

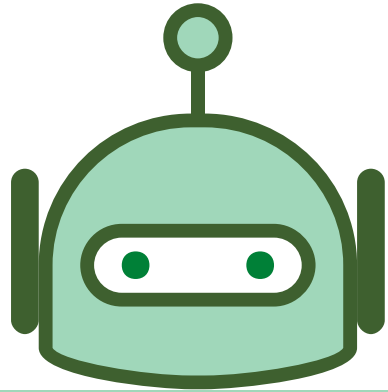
BOT DESIGN

Mapping your bot experience



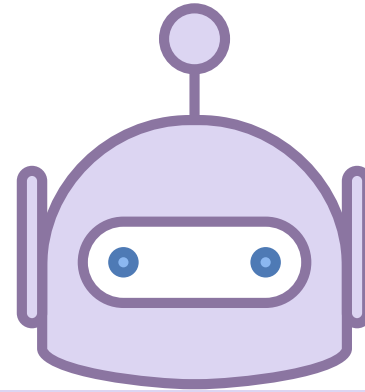
#BOTGOALS

Now for the fun part. In this section we'll map out the bot experience for each of the questionnaires you completed. First, let's consider the main roles a bot can play in a conversation. It's helpful to consider at what point in the conversation your customer will interact with a bot. To keep things simple, think of bots doing three types of jobs:



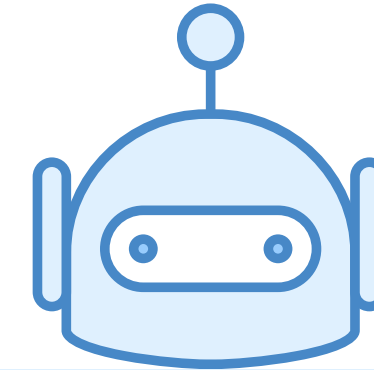
Welcome/Routing

Create a bot that immediately greets your customers and starts gathering information to determine the nature of the customer's inquiry. Use that information to query internal systems to get background information and then route the customer directly to the appropriate queue or agent.



Concierge

This kind of bot can be used at any point in the conversation. This bot asks questions to guide your customer to the appropriate person, department, or topic. Customers can either respond with a discreet set of responses presented in a menu form or captured as free text.



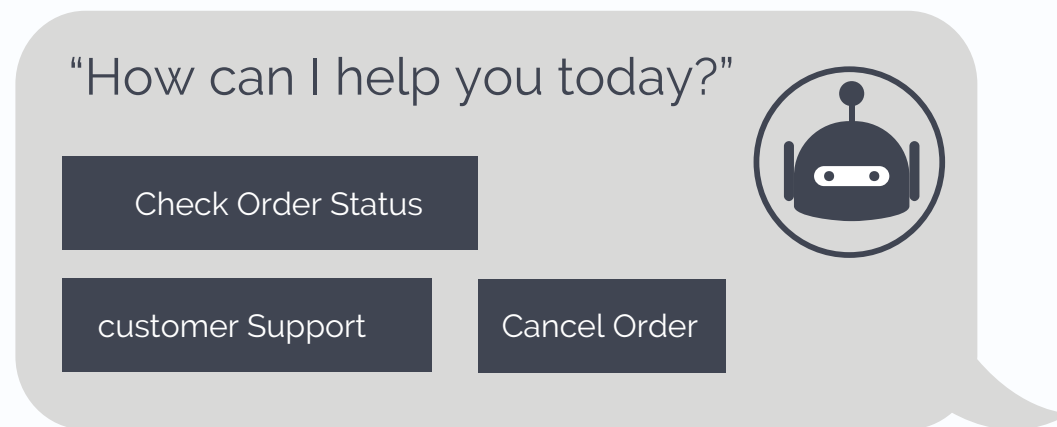
Troubleshooting

Use a Troubleshooting Bot to walk through diagnostic steps to isolate an issue. In order to keep things manageable, you can build many different bots to diagnose different problems and use Quiq to seamlessly transition between bots so that your customer never knows. Agents can invoke a troubleshooting bot to help out at any time in the conversation.

Experience Mapping

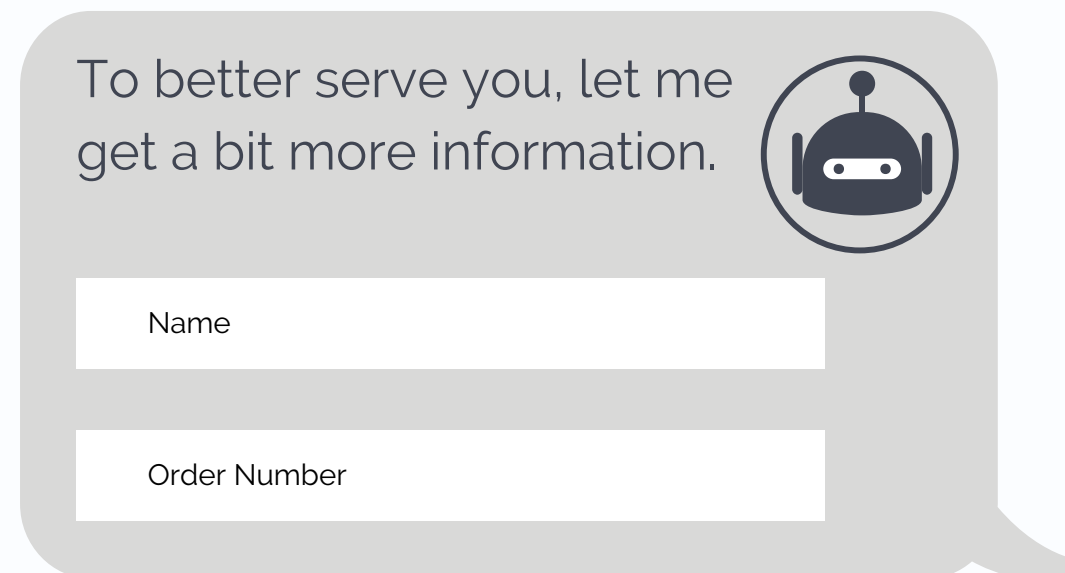
In this section we'll map out the bot experience for each of the questionnaires you completed using 10 basic behaviors the bot can take.

- **Determine Intent** - Ask a question that determines the customer's intent and choose what the bot does in response to each intent.



Each intent option can then route to another bot behavior, including another set of intents.

- **Gather Data** - Invoke a number of questions that gather data from the customer before proceeding in the bot's flow.



- **Send a message** - As a response, the bot can send a message and optionally wait for a customer's response when determining where to go next.



The Send a Message behavior can be somewhat confusing because there are other higher level behaviors that also send messages.

Experience Mapping (cont.)

- **Execute logic -**

Execute rules-based logic that can determine where to go next in the bot's flow

Execute Logic

Add Comment

If **time.now** happened during the following hours of the day: 8:00:00 am to 5:00:00 pm in US/Mountain Make complex condition

Move to *
Default Queue

Go to Default Queue →

Add action step Add decision step

Otherwise Add Condition

Send the following message:

Message *
I'm sorry, you've reached us outside of normal business hours.

Move to *
How may we help you?

Go to How may we help you? →

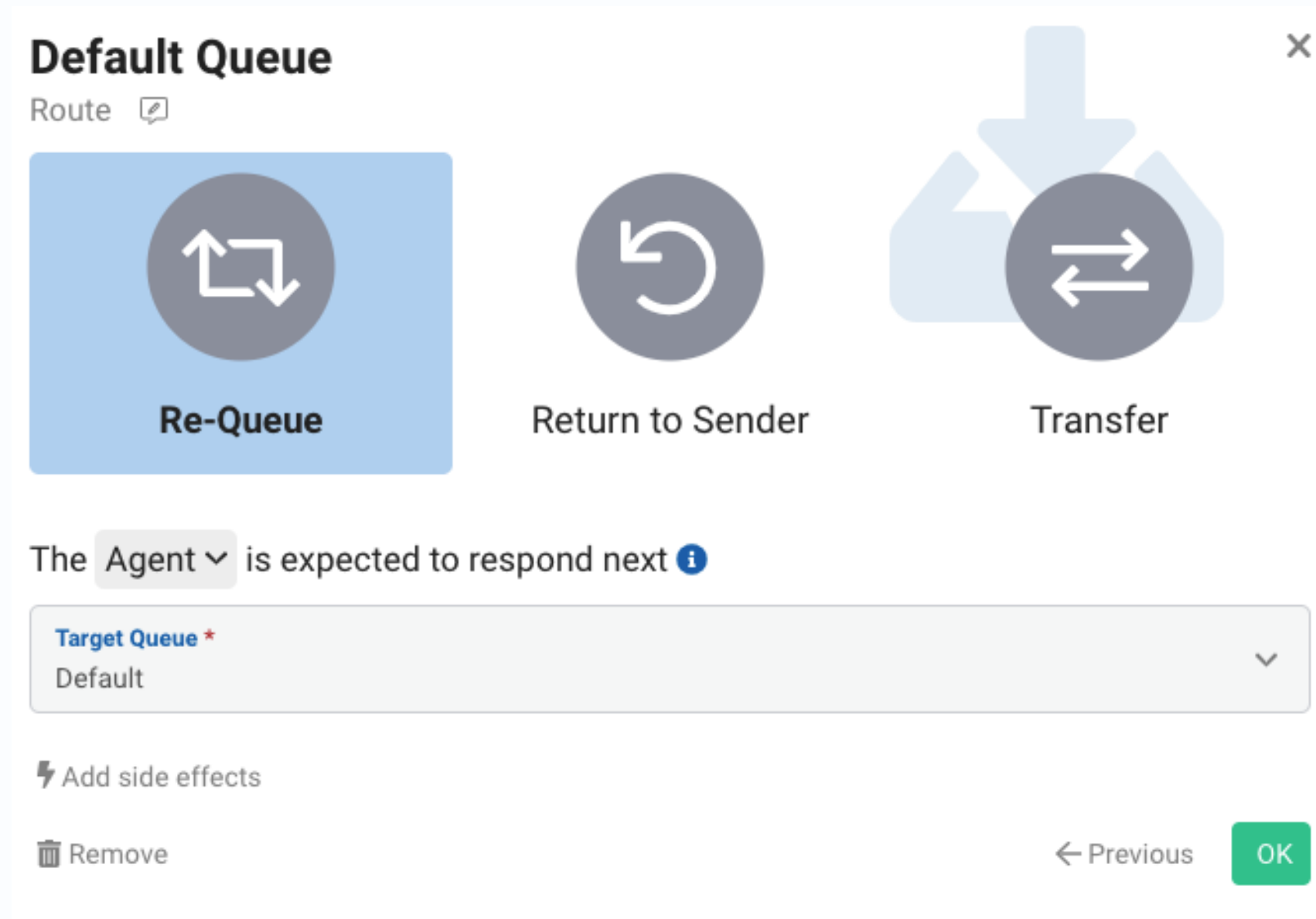
Add action step Add decision step

- **Call Webhook -**

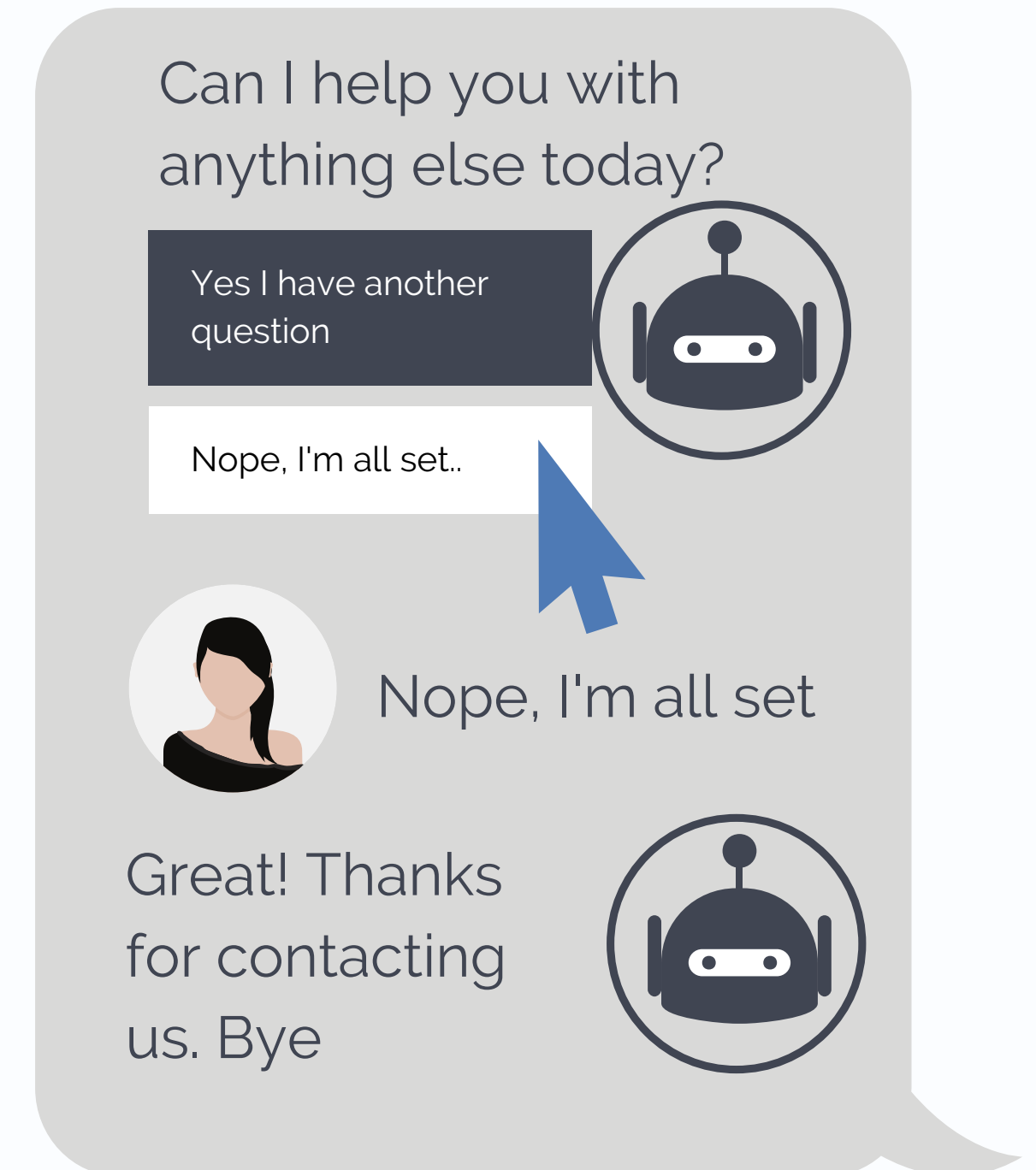
Allows the bot to communicate with external systems and allow them to affect the bot's behavior.

Experience Mapping (cont.)

- **Route** - Exit the bot's flow and route the conversation to another queue or user (including another bot)



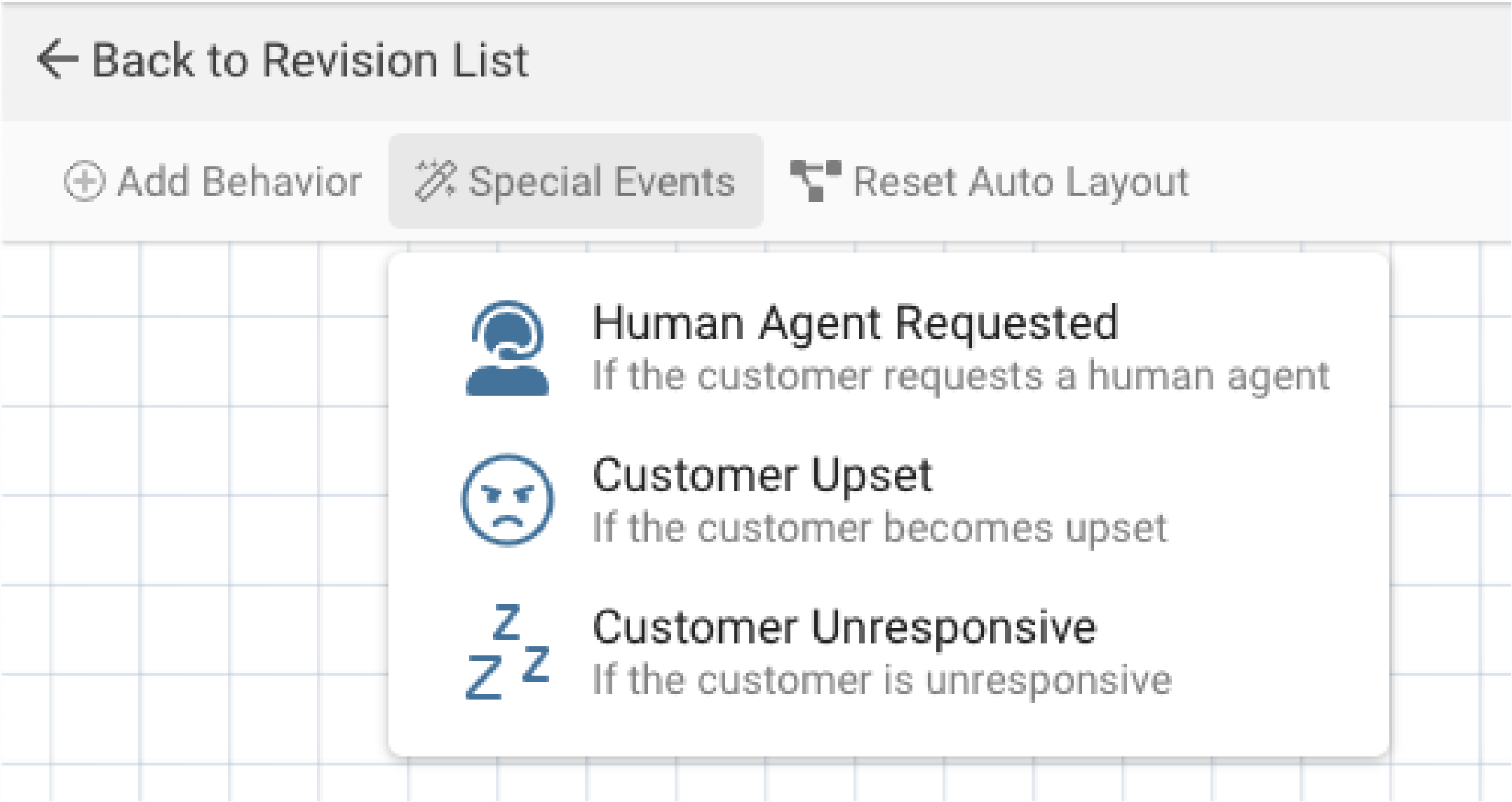
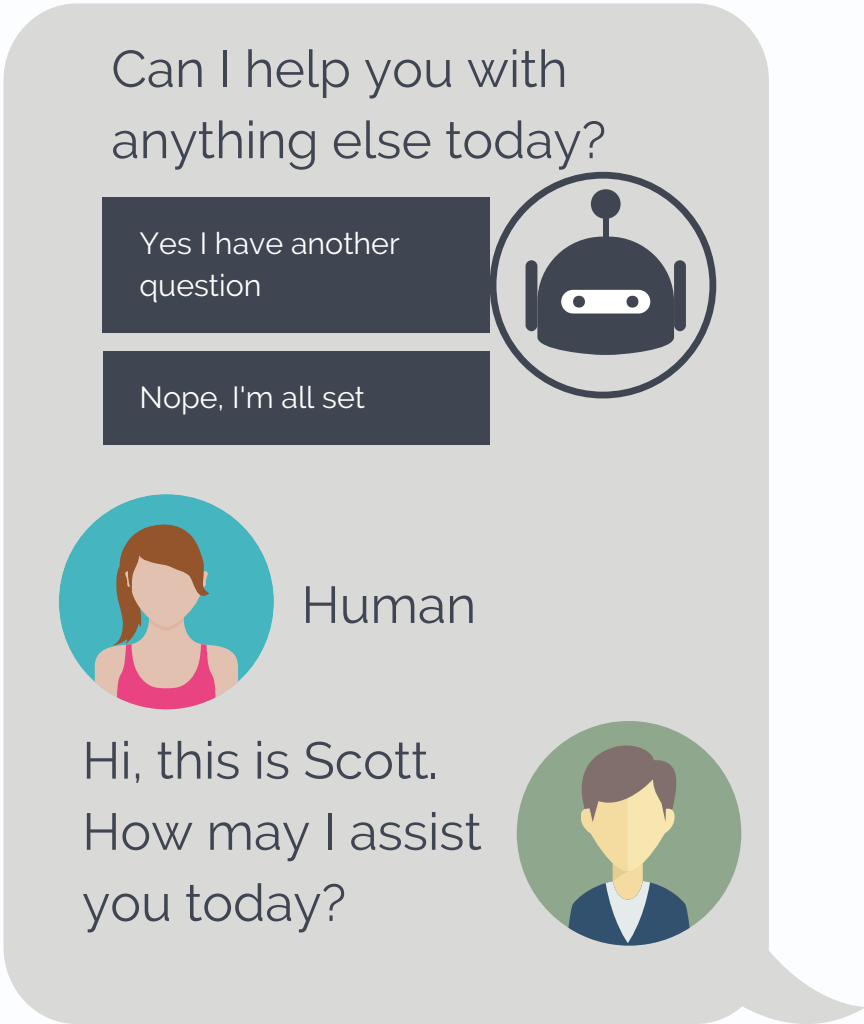
- **Close** - Close the conversation



Experience Mapping (cont.)

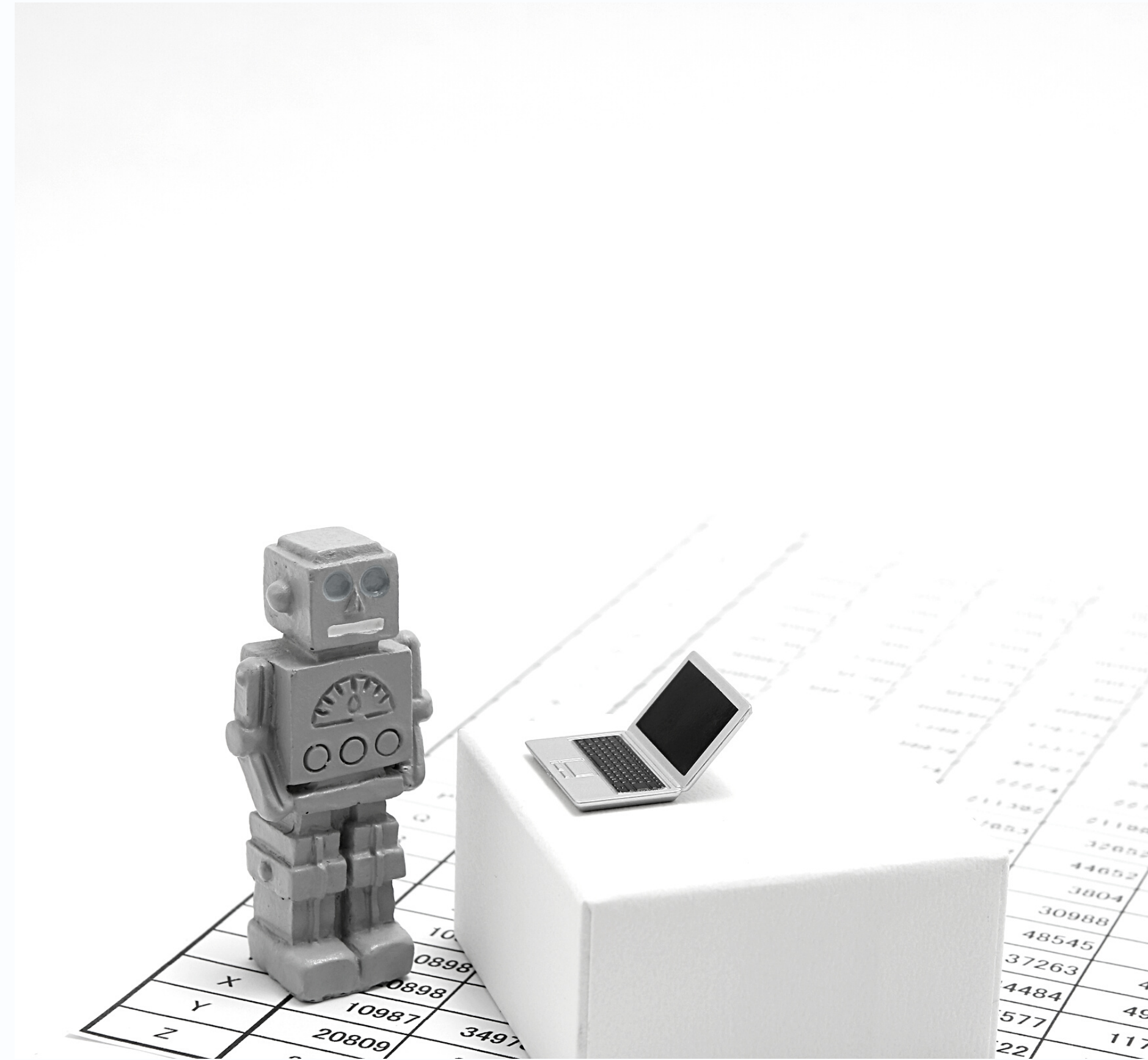
- **Human Agent Requested** - At any time in the bot's flow, route to a human by simply typing "Human"

- **Customer Upset** - Using AI, determine if a customer becomes upset within the bot's flow and immediately act
- **Customer Unresponsive** - If the customer becomes unresponsive within the bot's flow, determine an action



A LOOK INSIDE

How this all translates to your
first bot build



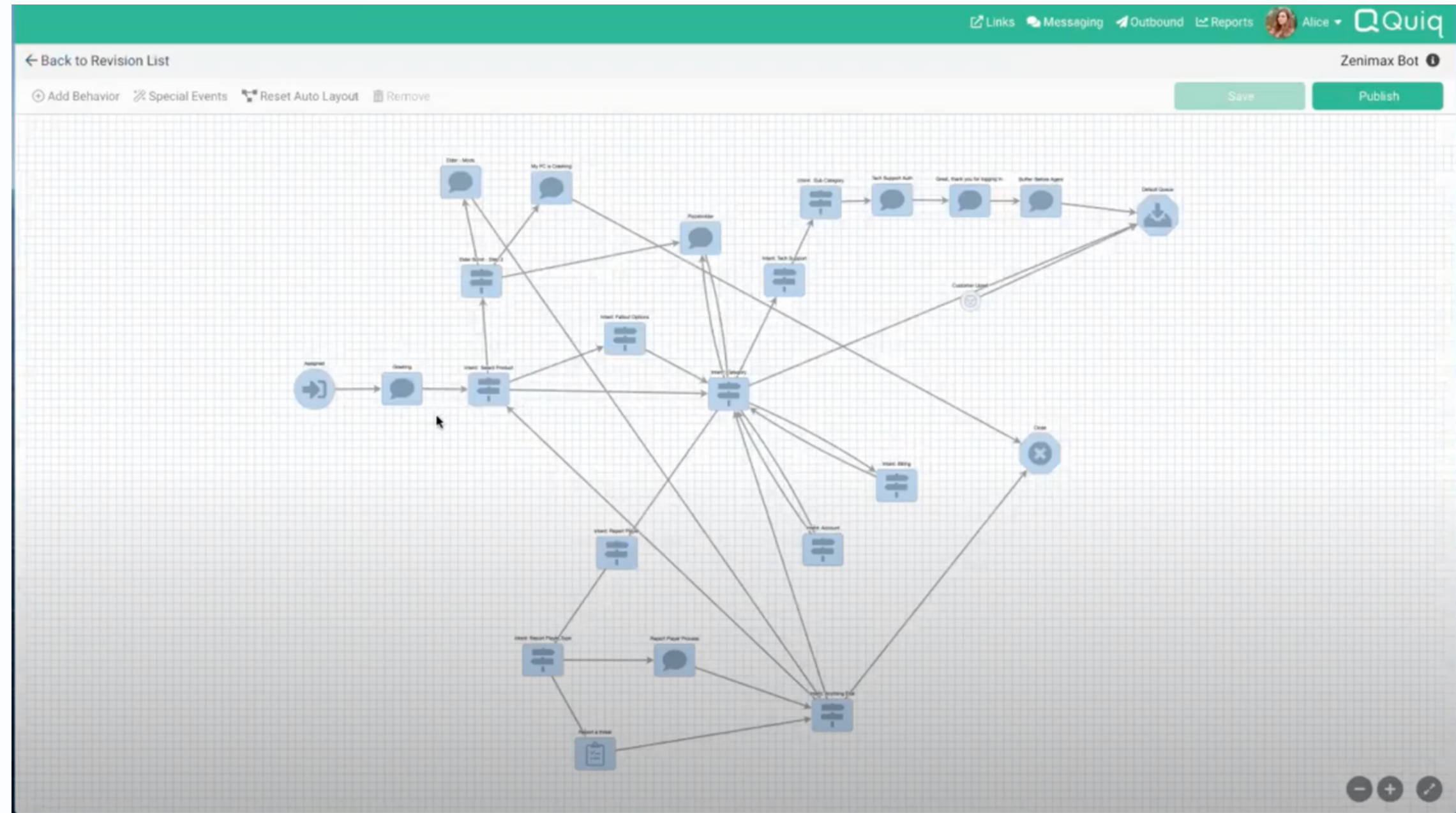
The Nuts and Bolts

Now that you understand the behaviors that a bot uses to engage with your customer, let's look at how you'll use those behaviors to create a conversation.

The image to the right is what a bot looks like in Quiq . If this looks intimidating, don't worry your Account or Project Manager can help you get here starting with the work you're doing now..

Each of the boxes and circles on the image represents a point in the conversation where a bot is sending or gathering data to understand what the customer would like to do. We call these boxes nodes.

Each node represents one of the behaviors discussed above. For example, You might decide to go to different nodes based on information such as data gathered from a chat welcome form, staffing information, queue depths or the current time of day.



Configuring the Bot

When the bot is configured, you'll need to define what each of the nodes will do. A good starting point is an intent behavior.

The determine intent behavior makes it easy for you to figure out what the customers' current motive is and move to other behaviors appropriately. It is represented with street signs because each intent is required to go somewhere. An intent behavior is a good first location for any bot that directly receives conversations from customers.

How can we help you?

Determine Intent

Prompt the user for their intent

Message *

How can I help you today?

Re-Prompt the user for their intent

Message *

Is there anything else I can help you with?

- ☒ Send a different message if the customer returns to this location
- ☐ Always ask the user for their intent even if it can be determined from a previous message

Intents

Order Status

Move to *

Please enter your order

+ ▼ >

Cancel Order

Move to *

Please enter your order

+ ▼ >

Product Info

Move to *

Default Queue

+ ▼ >

Privacy Policy

Move to *

Please enter your order

+ ▼ >

+ Add New Intent

If the bot can't decide

Prompt again

Remove

← Previous OK

Go With The Flow

If you haven't done so already, you'll want to create a bot flow. Think of it as a journey map for the conversation. The bot flow is a way to map out the step-by-step process to get to the answer the customer needs.

Start with a frequently asked question and determine what the appropriate responses are. From there you'll want to consider where the customer should go next.

There are some helpful tools that can help you map out the conversation.

- Excel - no need to get too fancy. Simply enter questions and responses into excel
- Visio
- Lucidcharts
- Mindmapping software

Pick whatever solution helps you to easily understand the customer's experience with the bot. What are you waiting for? Let's build some bots!



Next Steps

That's it! You've completed the chatbot workbook and you're ready to dive in to building your first bot.

1. Your Account Manager will set up a 30 minute call to go over your findings from this workbook
2. Based on the discussions and findings, if applicable, your Account Manager will provide you with a quote and a Letter of Effort explaining the implementation of your Bot
3. If you are planning to build your own Bot, your Account Manager will insure that you have access to the Bot Designer, Bot Guide and Training Material
4. If Quiq will be building your bot, your Account Manager will set up a series of calls that will coincide with the implementation that is applicable to your Letter of Effort
5. We'll get to building...

QUESTIONS? COMMENTS? LET US KNOW!

www.quiq.com

Contact your account or project manager with any questions or concerns.

