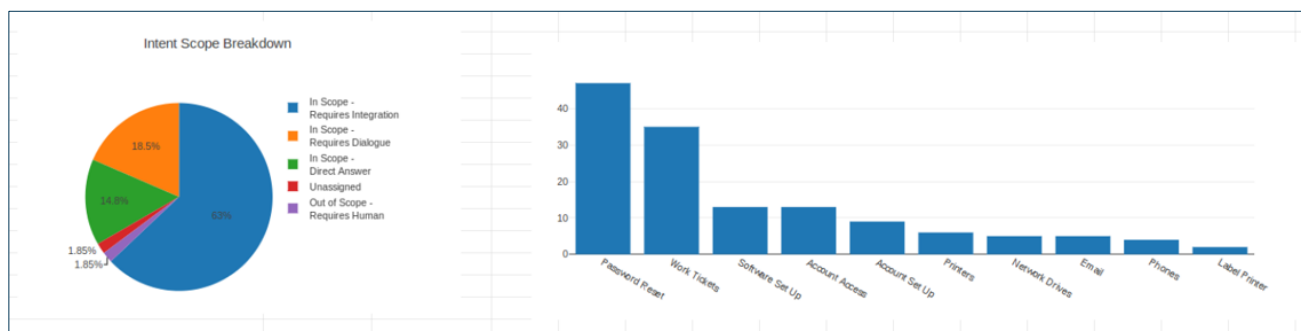


# Creating a 20/20 Vision for Your Chatbot, Virtual Agent & Live Chat Strategy

With 2020 identified as the year customer experience will overtake product and price as the number one way by which companies will differentiate themselves<sup>1</sup>, it's more important than ever to effectively serve and engage customers across touchpoints. When selecting a vendor to work with on your chatbot, virtual agent and live chat strategy, be sure they have the right tools and expertise to help you create and implement a vision that is unique to your company and customers. You want a partner in the process who will help guide you on industry best practices and customizing a strategy that is right for you. Here are three steps and a checklist to get you started on the path to a 20/20 vision for your customer experience (CX).

## Step 1: Build your business case with the right data and tools.

Work with a vendor that is able to start with the data your organization already has to build your business case through powerful machine learning and analytical tools. These tools should use sector-specific intent libraries to facilitate the textual analysis of data such as live chat or contact center transcripts. This analysis helps you build a business case for automated self-service by identifying what queries could be handled by a chatbot or virtual agent without the need for a live agent. It also identifies the data – from those transcripts as well as any existing chatbot projects – that can be used as training data to jumpstart the development of a new chatbot or virtual agent. **[Estimated time for analysis: 1 day]**



## Step 2: Hold a workshop to identify KPIs and outcome goals.

Armed with the information from Step 1, hold a consultation workshop with the vendor to review those results and identify the key performance indicators (KPIs) that are important to your business. Using KPIs that are vague or generic will make it difficult to articulate a vision that is properly customized to your business needs and will keep you from reaching your CX goals. Use this workshop to consult with the experienced vendor about measurable goals, what expected outcomes are realistic and the best ways to target your specific KPIs. **[Estimated time for workshop: 2-3 hours]**

## Step 3: Build a POC using analysis results and workshop outcomes.

Building a proof of concept (POC) around what you already have – data from existing projects, results of the transcript analysis, etc. – gives you the opportunity to start seeing positive results from this technology before making a larger investment. A successful POC strengthens your business case and enables you to finetune your strategy based on real feedback and customer interactions. Take time to talk with the vendor's references about their first-hand experiences with the team and technology. Also use the POC phase as an opportunity to test integration points to ensure your solution will work end-to-end as you expand the deployment. **[Estimated time to build POC: 30 days or less]**

### Checklist: Partner with the right vendor.

- Expert team with experience in consultation and technology
- Reference customers, ideally in your sector
- Proven technology that is secure and can scale to your requirements
- Flexible hosting options (on-premise, cloud, private cloud)
- Flexible pricing options (transactional, subscription, perpetual license)
- Suite of products with tight integration of chatbots, virtual agents and live chat
- Orchestration platform with options to customize human curation, natural language processing (NLP) and machine learning/AI components
- Flexible integration with existing content sources and backend systems
- Feedback loops that integrate with internal workflows for continuous learning

**About Creative Virtual:** As a pioneer in the chatbot and virtual agent space, Creative Virtual has played an important role in the advancement of this technology and the ways in which it can be implemented. Our expert team closely monitors trends and the evolution of customer and employee engagement in order to provide organizations with cutting-edge chatbot, virtual agent, live chat and conversational AI solutions. Today we are a world leader in the industry, being named the 2019 Product Leader in AI-Enhanced Customer Self-Service by Frost & Sullivan and winning The Queen's Awards for Enterprise: Innovation 2017.

Learn more on our website [www.creativevirtual.com/us](http://www.creativevirtual.com/us) or by email [infousa@creativevirtual.com](mailto:infousa@creativevirtual.com).

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<sup>1</sup> [Frost & Sullivan Best Practice Award](#), AI-Enhanced Customer Self-Service – European Product Leadership 2019