Guide to Selecting a
Virtual Agent or Chatbot Vendor:
Forget the Technology & Focus on Experience

Featuring tips from industry experts

Digital self-service has risen to the top of companies' must-have lists. AI-powered virtual agents and chatbots are the perfect tools for providing easy-to-use self-service, but only if they *actually* deliver the help users need. If your virtual agent or chatbot doesn't provide a consistently positive experience, it would be better to not offer one at all.

When selecting a virtual agent or chatbot vendor, organizations place a focus on evaluating the technology. They mistakenly believe that having the 'right' technology is what will give them that positive self-service experience. The reality is that having the technology means nothing if it's not implemented and maintained properly.

Organizations in the process of selecting a virtual agent or chatbot vendor need to forget about the technology and focus on asking the right questions about the vendor's experience and expertise.

Often chatbots and virtual agents are talked about as a new self-service solution that burst onto the scene several years ago. That's not the case. The technology has been used in areas such as website self-service for over two decades. This is important to know because, even though these self-service tools may be new to your company and team, they shouldn't be to the vendor you select.

When it comes to creating positive experiences and getting the most from this technology, there is no substitute for having real experience with building, integrating, installing, maintaining and expanding conversational virtual agents and chatbots. That is why you don't want to select just a technology vendor. Instead, you want to work with a vendor who will be a knowledgeable partner throughout the entire process and one that will become a trusted extension of your own team.

Here are six areas of experience you should ask potential vendors about, why having that expertise is important to the success of your virtual agent or chatbot and insightful tips from industry experts.

Expert Tip

You should feel comfortable saying to your vendor, *"we don't know what we don't know and are looking to you as the experts"*. This applies to everything from possible use cases to suggestions for conversational flows to UI design tips. If you don't have confidence they will guide you in the right direction, you're working with the wrong team.

Rachel F Freeman, Operations Director

#1 Experience in your industry and/or for your specific use case

When selecting a vendor, ask about specific experience in your industry or for your intended use case. While the underlying technology might be the same across the board, how you build and deploy the virtual agent should be customized for you.

Familiarity with your industry means the team already understands your common frequently asked questions (FAQs), sector-specific terminology and what content is best suited for self-service. They also have first-hand knowledge about how to design and deploy a solution that delivers the best experience for the type of information you'll be presenting to users.

The intended user group for your virtual agent is also very important. Virtual agents are successfully supporting customers, employees and contact center agents, but the way you build and deploy those solutions can vary greatly.

Expert Tip

A proper business virtual agent has many parts and building one involves knowledge in many areas. If any part is new to you or you aren't extremely familiar with the tools you are using, you're stuck applying the principles of *'hoping this works'* and *'changing stuff and seeing what happens'*. When you outsource this to an experienced provider, you get a whole team of people who not only know what they are doing but have done it thousands of times. They have a deep understanding of how to use their tools *and* how they work, so nothing is a mystery anymore.

Claudio Chico, Development & Support Technician

The same is true with deploying self-service on different contact channels and touchpoints.

Always ask for reference clients in your industry or for your use case and speak with them specifically about their experiences working with the vendor.

#2 Experience with building a strong business case

A good chatbot or virtual agent vendor will help drive the entire project, starting with assisting you in building a business case. They should have the ability to perform a textual analysis of existing data such as live chat or contact center transcripts and identify what queries can be handled by a virtual agent without the need for a live agent. That should be followed with a consultation workshop to review the results of the analysis and collaborate with you to identify your key performance indicators (KPIs) and set realistic goals.

Even if you think you know what you want, it's beneficial to work with experts who aren't afraid to push back on your initial requests with suggestions and ideas you may not have known to consider. They should be able to show you examples of other working virtual agents to help you further develop your own business case and gain a better understanding of how the technology can address your pain points.

An experienced vendor recognizes the importance of getting to know your company and asks the right questions to effectively build your business case and customize your self-service solution. They are able to tell you what teams and departments will need to be involved at each step and what specialists from their side are best to include based on your unique project plan.

Always ask if the vendor offers an initial consultation and data analysis to help you build a business case and create a realistic project plan.

Expert Tip

Having a clear business objective will dictate much of what and how the chatbot is implemented. For example, is the objective to reduce phone calls or live chats – and how will that be tracked? Is it to improve customer satisfaction – and how will that be measured? Another key question to ask when thinking of customer experience is: are we really meeting the needs of our customers or are we just trying to make a score look better?

Rachael Needham, Head of Delivery Management

Expert Tip

It's hard to have reasonable expectations about what can (and should!) be automated if you don't have an understanding of the complexity associated with the delivery of machine learning and natural language processing (NLP) solutions. You want to work with a vendor who will collaborate with you to set the right expectations and realistic goals and manage the project to achieve those outcomes.

Len Power, Sales Executive

#3 Experience with building and deploying successful solutions

The success of a virtual agent or chatbot relies heavily on having the right content and presenting that information to the user at the right time in a way that is clear and concise. Building and deploying your self-service tool to do that requires an expertise that can only be gained through experience.

A vendor with that expertise will help you:

- start with a focused set of FAQs that will address your biggest pain points
- identify what questions are suitable for self-service and which are better handed over to a human-assisted channel for resolution
- break down complicated content step-by-step for a better experience
- build conversation flows to guide users to the specific piece of information they need
- structure answer content to work with the many different ways users may ask the same question
- address the best way to identify and incorporate your product names and specific company or industry jargon/ terminology
- create the right tone and branding for your tool to build confidence

Expert Tip

Avoid using "Yes" and "No" at the beginning of virtual agent answers as it may not fit with the many ways a question may be asked. Adding the subject within an answer also gives the user confidence that they have received the correct answer. For example, when answering *"Can I have 3 slices of cake?"* instead of *"Yes, you can."*, use *"You can eat as much cake as you like!"*

Maria Ward, Account Manager & Knowledgebase Engineer

- design the best user surveys and feedback loops for your use cases and objectives
- implement the right mix of natural language processing (NLP), human curation of content and machine learning for both continuous improvement and reliability
- put in place the correct workflows within the virtual agent orchestration platform for creation, approval and publishing of new and updated content

Typically, the best approach to deploying virtual agents is to use an agile approach and start small (focus on a particular area of content, use case and/or contact channel) and scale the solution from there. You want a team who will not only collaborate with you to design a staged rollout but also has experience successfully executing those plans in a way that streamlines efforts and supports your identified KPIs.

Always ask about the vendor's build process and how they will address any specific customer journeys or complex content in your virtual agent that will be key to creating a positive self-service experience.

#4 Experience integrating with other systems and technologies

Having a stand-alone chatbot or virtual agent creates disjointed engagements and destroys efforts to deliver an omnichannel experience. It also limits the functionality of your tool and how it can benefit your customers, employees and organization. The right vendor will make a point of discussing possible integration points with you as part of the planning process to help you get the most from your virtual agent or chatbot.

Your vendor should guide you through the process of thinking about the bigger picture of your entire customer or employee experience and how your virtual agent can be a connected part of your overall strategy. They should provide a list of pre-built connectors and be able to build upon your existing technology.

Having expertise in this area means a vendor will know what integrations are necessary to automate common user journeys in a way that creates a positive experience. They will know what is involved with deploying your chatbot on a variety of channels, such as a mobile app or messaging platform. They will know how to customize your virtual agent to deliver specific content based on points of access, such as different answers within logged in areas and public areas, or based on user profiles, such as different answers for a manager or an intern.

Always ask for the vendor's list of pre-built connectors and experience with any specific APIs you will want to use to integrate your virtual agent with other technologies or solutions.

#5 Experience creating the right user experience & user interface

Having the best technology in the world means nothing if it's not implemented in a way that creates a positive experience for users. A vendor with expert knowledge in this area will be able to help you design a user interface (UI) and user experience that is on-brand, easy-to-use and creates user confidence. They have a clear understanding of how people interact with their virtual agents and already know what works and what doesn't for different user journeys, contact channels and content types.

Ensure you are partnering with a vendor who will collaborate with you to customize the solution to your needs, not just provide you with a set list of standard options. They should listen to your vision and provide feedback based on their extensive experience on how to make that a reality, providing alternative ideas and best practice guidance to further improve your strategy. They should be able to identify any technical roadblocks you're likely to encounter and provide solutions on how to remove or work around them.

The right team will also share advice about where and how to deploy your chatbot or virtual agent to increase usage and improve self-service where you need it the most. They will help ensure you are reducing customer and/or employee effort and adding value to interactions. There is no one-size-fits-all solution when it comes to creating the right user experience, so don't settle for a generic approach.

Always ask to see examples of various, well-performing UI designs as well as how the vendor will collaborate with you on creating your user experience.

Expert Tip

It's very important to be aware of your users' technology when you're implementing a virtual agent to ensure it will be compatible. For example, it's not uncommon for large companies to have very old systems and browsers that are still being used companywide. This can cause issues if not taken into consideration when developing an internal virtual agent.

Peter Studd, Senior Knowledgebase Engineer

#6 Experience delivering ongoing success & future developments

If during your selection process a vendor tells you that you can deploy their chatbot solution and then let it do its thing without any ongoing maintenance, cross them off your list immediately. While the time and effort needed on routine upkeep typically decreases as the solution matures, a virtual agent or chatbot should never be a 'launch it and forget it' self-service solution. Long-term success requires attention, just like every other part of your customer and employee experience strategies, to keep the tool delivering accurate content and a positive experience.

You want to partner with a vendor that has a proven track record of virtual agent success with long-standing customers. They will be able to provide guidance on how to keep your solution performing well and addressing your biggest pain points, even as content, channels and user journeys change. They will help you further develop your solution to keep pace with evolving user expectations and changes in policies, procedures and regulations.

An experienced vendor will save you time and money because they know where to concentrate maintenance efforts. For example, they can quickly identify areas where content updates or additions will improve the user experience the most. They can help you be proactive and prepare for upcoming events (product launches, process changes, etc.) to keep human-assisted channels, like live chat or call centers, from being overwhelmed. They can assist with analyzing quantitative and qualitative data to suggest new integrations or developments that will have the biggest positive impact.

Expert Tip

In this era of data, a sophisticated virtual agent can play a very significant role for many businesses. The conversational data collected is very rich. It can be analyzed and mined to understand your customers' views, identify developing trends and make informed predictions, which can in turn contribute to areas such as product or service innovations and marketing.

Ridhi Mathur, Development & Support Engineer

Keeping an established virtual agent or chatbot performing well during times of business-as-usual tends to feel like a straightforward task. However, when faced with an unexpected or sudden situation, such as a company or industry emergency, a natural disaster or a global health crisis, you should never underestimate the importance of having an experienced consultant as part of your extended team. You want someone there who can assist with quick updates to content and content delivery and who can provide expert recommendations based on proven techniques.

Always ask about the vendor's longest standing customers and to see examples of their well-established chatbot and virtual agent implementations.

When it comes to selecting a chatbot or virtual agent vendor, you want a provider who has the knowledge and skill to help drive your entire project from the business case to the initial build to the ongoing development. The only way for a vendor to offer that kind of knowledge and skill is to have a team of people who have done it all many times before. Collaborating with an expert vendor means you immediately benefit from the experience of every single member of their team, saving you time and money and keeping your project on the right path from the start. You want to be able to build a true partnership with a provider that becomes a trusted extension of your own team.

So, forget about the technology and always ask about the vendor's experience and expertise. If they have proven success in driving effective virtual agent and chatbot implementations that match with your needs and expectations, then chances are both the team *and* the technology will be the right fit for you.

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 for nearly two decades. 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, named the Product Leader in AI-Enhanced Customer Self-Service by Frost & Sullivan, ranked as a Leader in Everest Group's PEAK Matrix for Intelligent Virtual Agents and winning The Queen's Awards for Enterprise: Innovation.

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