

• Ebook •

The Ultimate Chatbot Guide

A 101 guide for understanding the market,
and what to consider in a [solution](#)



What's in this ebook for you

Components of a successful chatbot platform	3
Choices in creating a chatbot	9
Critical capabilities and offerings for a chatbot platform	13
How it all works together	15
Getting started	17

Components of a **successful** chatbot platform

- Having the right capabilities and tools available to you in a chatbot building platform can make your assistant easier to build but can also define the success of your project in the long run.



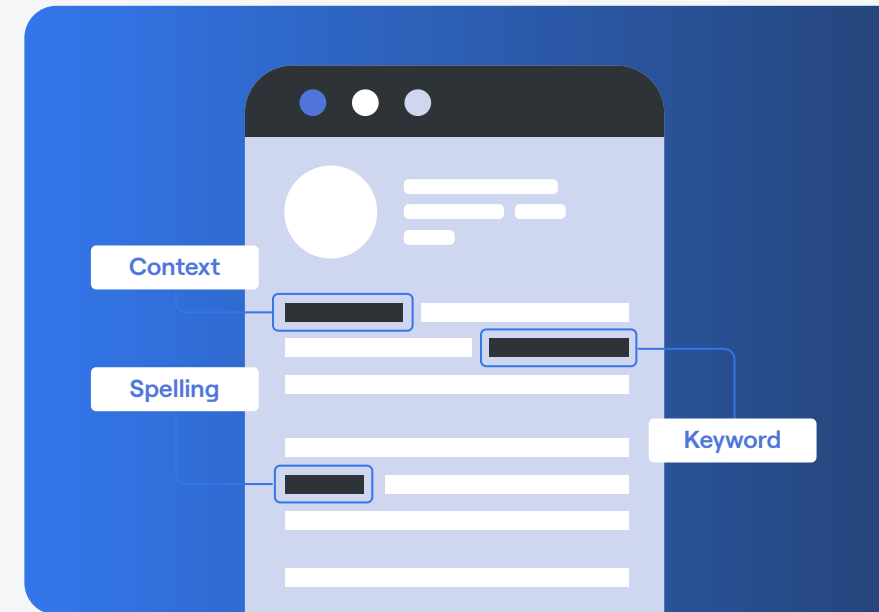
1. Going beyond predefined QnAs

There's no question that FAQs have their place within a chatbot. Giving your customers access to multiple-choice or pre-determined answers quickly and directly might be all you need for certain areas of your use case.

However, if you want to create an intuitive and sophisticated chatbot experience, you need to expand capabilities past predefined questions and answers. QnAs break down if the user provides any input outside of the predetermined options. To build an intelligent chatbot, you need to be leveraging natural language understanding (NLU), for both FAQs and advanced flows.

- **A successful chatbot needs to reduce friction for a customer and help them achieve what they set out to accomplish.**

One of the benefits that NLU provides is allowing users to complete their requests using their own words (AKA natural language). If the chatbot understands the natural language of a person and can respond intelligently by tapping into data that has not been pre-programmed, the user remains engaged, and will likely continue their interaction with the bot. From answering questions and handling user transactions to providing recommendations, NLU expands what your chatbot can do exponentially.

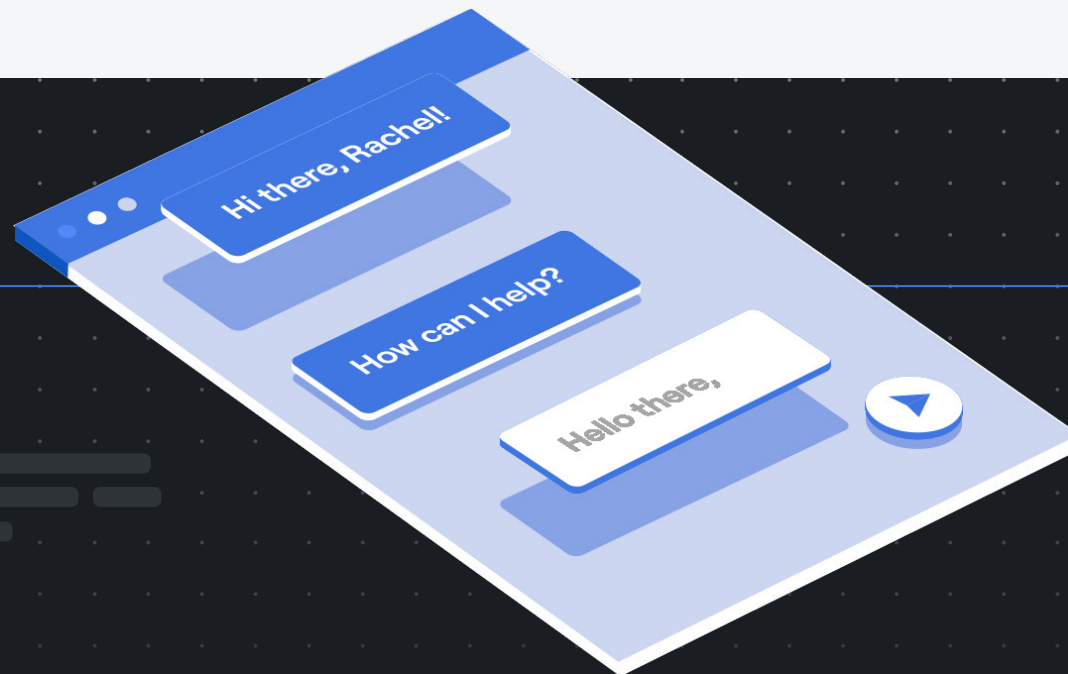


2. Built with Strong NLU and NLG

Chatbots that are limited to multiple-choice and simple FAQs won't be impactful for a business or its customers.

If you are not using a chatbot platform that has the means to use NLU or natural language generation (NLG), you are missing out on one of the most exciting and rewarding opportunities in conversational AI - building a truly intelligent chatbot. Leveraging natural language understanding or natural language generation isn't easy though, and you can't just flip a switch and have all of it configured and ready to use. It takes careful planning to be able to benefit fully from this technology.

NLU goes beyond just allowing customers to talk more naturally to a chatbot assistant. Advanced capabilities include language identification, spell checking, detecting entity patterns automatically, retaining context after a conversation has ended, and much more. NLU utilizes large sets of intelligent data to accomplish this and gives users a more personalized experience as a result. To reduce the time it takes you to build an assistant, expand it, and create an experience that will be accessible and valuable to your user base, look for platforms that come equipped with an NLU/NLG engine.



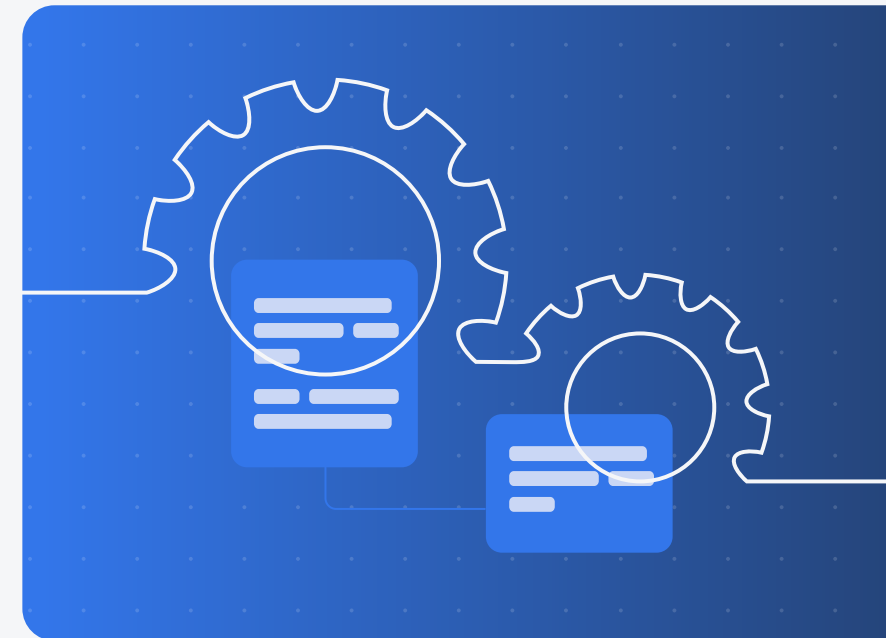
3. Ability to customize

Every conversational AI project will need some level of customization at some point. There are many places in which customization is critical, but not all may be important from the get-go. Customization includes both integratability and creating a unique customer experience.

The last thing you want is another piece of software that doesn't integrate well into your system. Not only is it important for managing the complexity of your tech stack, but also, leveraging those integrations allows you to access data that can set your chatbot apart from the competition.

For example, being able to create a chatbot that integrates well with your CRM system will allow users to check their bank account balances and the last time they visited a local branch for fraud detection purposes. You can further ask them for feedback on their experience via the chatbot and add that to your customer satisfaction scores. Additionally, if they requested information about a home loan or other related services, you can utilize the data collected through the bot to proactively supply to your agents.

A successful customer interaction results in the customer wanting to return. Most of all, customers want to be provided with a service that is available 24/7, that feels personally catered to them, with access to a live agent when they need it. To accomplish this, it's important to ensure your platform can integrate well with channels and other software, thus providing the best experience.




A successful customer interaction results in the customer wanting to return

4. Reliability and scalability


As your chatbot starts to get more traffic and interactions, it's paramount that you have a platform that can support the increase in volume.

The platform infrastructure you build your chatbot on needs to be reliable, provide SLAs with minimum downtimes, and resolve bug-related conflicts quickly.



Reliability

Having a reliable platform to back you, means peace of mind once your project begins to make headway with your target user group.



Scalability

Platform scalability can mean both being able to operate under growing user engagement and that platform performance is maintained when your use cases start to see an increase in volume.

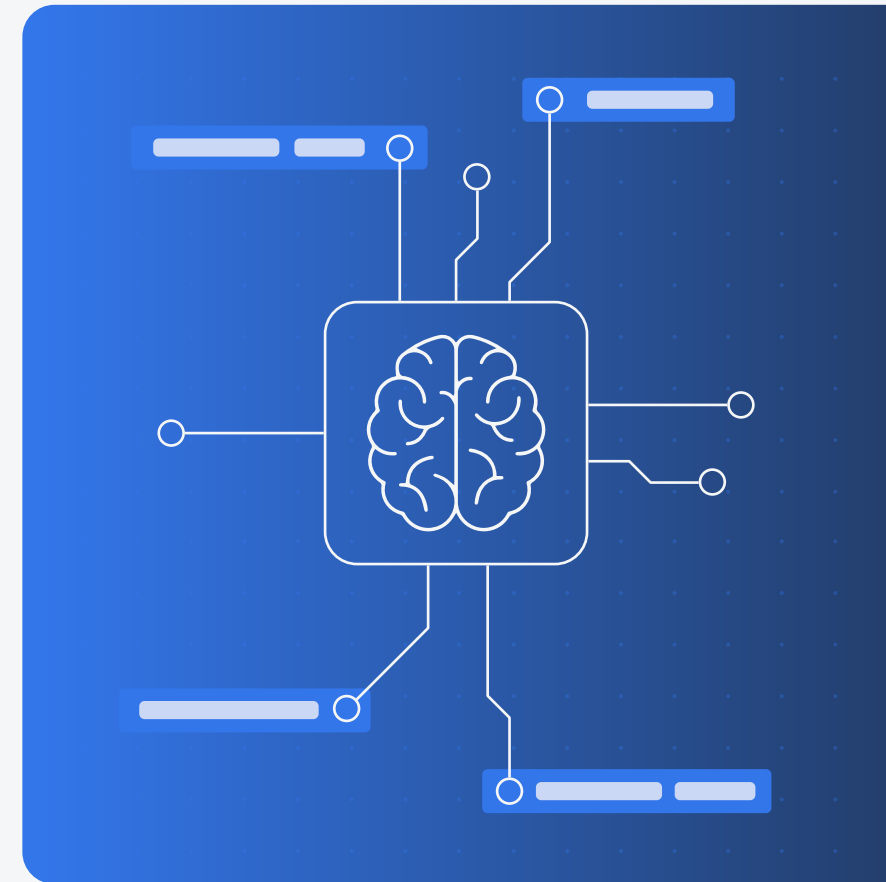
5. Continuous learning and improvement

After launching your initial chatbot, it's likely you will start to think about what comes next and how to expand on its capabilities.

Leveraging usage metrics, detecting misunderstood intent topics, and identifying out-of-scope areas currently not covered by your bot will help you iterate and improve your bot overtime. Your platform should have the necessary functionalities in place to identify these metrics and implement improvements without needing to use alternative products.

Additionally, the platform you use should have mechanisms in place to rapidly reuse objects that have already been created with your first use case. For example, it shouldn't take weeks to swap out content make changes to an existing set of flows.

- ◆ **Be sure to consider what it will take to scale and manage your chatbot once it reaches a certain size.**



Choices in creating a chatbot

- With a growing number of chatbot-building tools becoming available, not knowing the differences between them can feel overwhelming. Identifying the best platform for you and your team can have tangible benefits, like reducing resourcing costs and accelerating time-to-market. So be sure to research and test the platforms you are considering prior to starting your project.



1. Bare-minimum chatbot tools

There are some platforms out there that excel at providing you with the base-level tools of creating a chatbot, but be cautious. These platforms don't scale with a fully realized conversational AI chatbot.

They give you the tools needed to build and test, which at face value appear ideal for getting your solution to functioning status. However, after the solution is deployed, customers start to run into issues with the assistant, and support tickets start to flood in. The chatbot struggles because the tools lack the functionality needed to loop in a dedicated support team, which can assist customers.

Chatbot platforms like this are enticing, especially when they are provided by well-established providers, but they aren't specialized for building conversational AI, they are created to complement the rest of the product suite that the provider offers, including the deployment infrastructure, the analytics layer, and even the data integration layers.

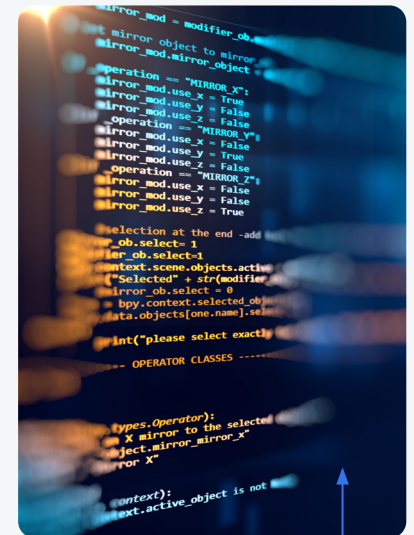
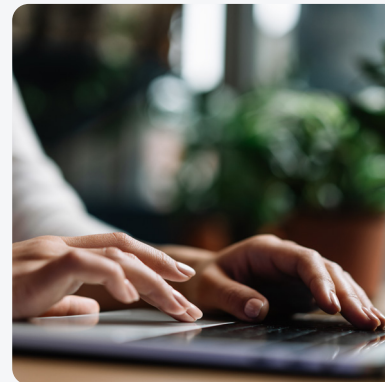


2. Build-your-own NLU tools

To create ground-level customization, it can seem like an easy decision to choose solutions with BYO NLU models. Being able to create the core machine learning models that support your project, and owning your code can sound perfect for creating a custom experience. The devil is in the detail.

Giving chatbot builders a blank slate can seem exciting at first, but for those not familiar with NLU or conversational AI, it can be daunting and discouraging. You might have the resources to bring in expertise like a team of data scientists, but that can be costly and competition for talent is fierce. Customers who are interested in starting from scratch need to be prepared to incur additional resourcing costs, slower time-to-value and potentially challenges around expertise.

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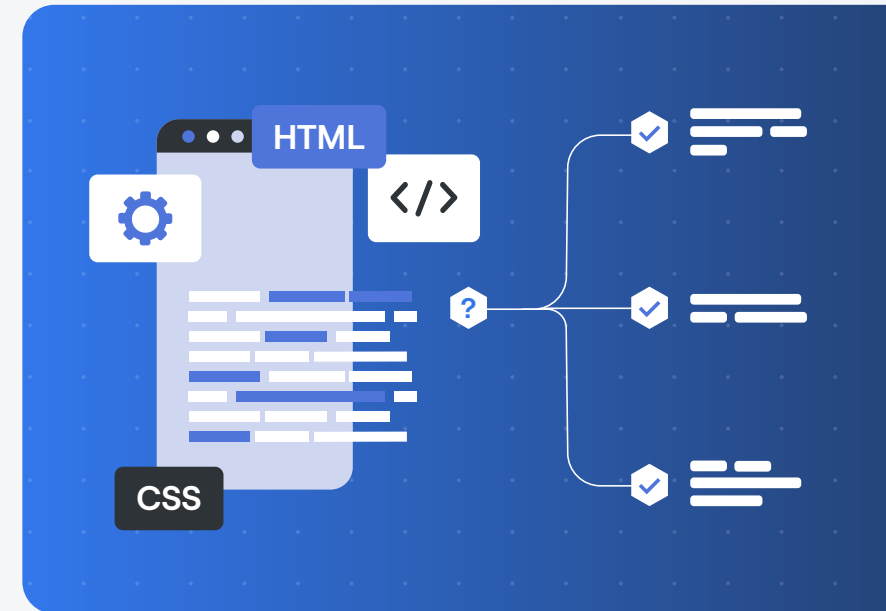


3. Best of both worlds

Finding a platform that can meet your customer expectations and can design and build one-of-a-kind experiences will make a huge difference in elevating your customer experience.

Try to find a platform that has a managed NLU engine (meaning the rewards of using NLU aren't exclusive to data scientists), is extensible to meet your customer expectations, provides support to your team, and gives you what you need to create a chatbot that can scale. Developing a conversational AI-driven chatbot doesn't need to feel like learning a new language. Having the right platform for you and your team does more than just give you peace of mind, it gives you cost-savings, accelerated time-to-market, and a support team always ready to help.

- **Having the right platform for you and your team gives you peace of mind, reduces costs, accelerates time-to-market and supplies a support team always ready to help.**



You don't have to be a data scientist to reap all the benefits, but you can if you want to!

Critical capabilities and offerings of a chatbot platform

- You now know what you need from a conversational AI platform at a high level, but what capabilities and features should you look out for?

While some features will make your life easier when creating a chatbot, there are critical functionalities that are non-negotiable when deciding whom to go with.





Conversation studio

Being able to visualize the conversational logic behind your chatbot so you can have confidence in each step you take.



Content management system

Having access to all of the content being used across your chatbot makes it substantially easier to make changes in bulk or one tweak at a time.



APIs

Robust APIs are a must when it comes to ensuring you have access to data to both pull into the chatbot platform and push to other tools when needed.



Managed NLU engine

Excited about scrolling through endless pages of NLU documentation to figure out how to configure and tune your models? Unless your launch is in two years, we wouldn't be either. A managed NLU engine means you get all of the power of conversational AI, without the hassle.



Channel integrations

Chatbots don't provide any value if they aren't available where your users are, so ensure there are integrations available for channels that your users are already accessing or will be soon.



Regression testing

Especially when things start to scale up, having regression testing in a platform will save you from having to manually go back to test any changes to your chatbot.



Customer feedback lifecycle

As your users start to interact with the chatbot, you need to be able to utilize the data and continuously improve your chatbot. Capabilities that help you identify misunderstandings, successful conversations, and future chatbot topics, are all critical in the long-term success of your chatbot.



Human-in-the-loop (HITL)

An interface for your customer service agents to interact with customers who use the chatbot when they need advanced help. A HITL interface should give your agents insights into the conversation so when they pick it up, they know exactly what is going on.



Deployment options

Every team is different, so be sure to choose a platform that can be deployed wherever you need it. Whether it is On-Premise, Managed Cloud, Dedicated Cloud, or Self-Managed Cloud, you deserve to be able to choose.



Dedicated support team

Documentation and self-learning options are great, but having a dedicated support team available will help alleviate any issues you may have with your project.



Collaboration tools

Being able to have your whole team coordinating in real time will save you from having to create extensive documentation for managing changes to content, flows, code, etc.

How it all **works together**

- Addressing customers with a chatbot experience that feels impactful and pleasant to use takes time, but if you have a process in place from the beginning, it can make things drastically easier.

If you are looking for a more in-depth content piece on [how to build a successful chatbot](#), be sure to follow the link.





Design

Begin with conceptualizing chatbot capabilities, known technical challenges, target channels, company branding, personalization, and other considerations for your chatbot. Design is a step that cannot be rushed, the last thing you want to occur is creating a chatbot that doesn't maximize the value it provides to you and your customers.



NLU training

While not all chatbots require NLU, sophisticated chatbots often do. When training your NLU, clarity is key for the chatbot to be able to identify user intents and give proper responses back to customers. So spend time recognizing what intents require NLU and which might be better off as a straightforward experience. Both provide an immense amount of value to the overall user experience.



Review with business teams

This is not necessarily a step you take after NLU training. You should pull the list of business requirements into your design and NLU training. You can either loop in your customer-facing teams periodically, or you can co-create using platforms that have an integrated conversational design and development environment. Your content and messages will always have to change and tune, and having the right platform to do that helps you accelerate your cycles.



Post-production and beyond

After you have launched your chatbot, now you can begin monitoring feedback and metrics that your users are generating. Having tools to identify usage metrics and areas to improve can help to make your chatbot successful over the long term.



Production

Congratulations on a successful launch! All of the necessary steps have taken place in the planning and testing of your chatbot. It can be beneficial to launch on one or two select channels instead of all of them at once in case you encounter any issues.



Testing

Catching potential bugs and issues before they happen is the payoff of having a good, thorough testing process. Being able to leverage regression testing and conversation emulators will make the process seamless. Ensure that there is proper test coverage across the chatbot and make sure to test early and often to avoid having to dedicate time and resources for backtracking through each flow. This also includes the channels you have configured your chatbot to be available on.

Getting started

- Finding the right chatbot platform doesn't have to be complicated. With so many options available, it's important to be informed about what to look for when considering chatbot vendors.

If you are ready to move forward with creating your chatbot on a platform that is easy to use, but doesn't sacrifice customization and capabilities, get started with a free trial or schedule a demo to check out our enterprise offering.





About Botpress

Botpress is the leading open-source chatbot stack, allowing developers to build better chatbots without a team of data scientists and machine learning experts.

First released in 2017, the Botpress platform has a unique managed NLU engine, an integrated development and visual conversational design environment, flexible integrations and extension options for customization, analytics, human-in-the-loop and channel integrations. Developers love Botpress, and the product has more than 9,500 Github stars and 100,000 users.

Botpress is based in Québec, Canada with additional offices in Montreal and Newark. For more information, visit www.botpress.com, [Twitter](#) and [LinkedIn](#).