

AI Chatbot Buyers Guide:

How to pick the right
chatbot for your organization.





Getting Started

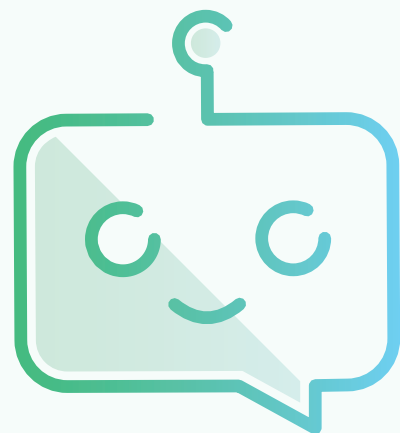
Kicking off a review of new business tools and solutions can be an intimidating task – especially when you are evaluating a new and emerging technology, such as an engagement solution enabled by AI. You know you need an AI-powered chatbot, but aside from addressing internal questions, you must develop criteria for evaluating the technology.

But where do you begin when creating this list? To give you a head start, we've compiled important areas you should consider when reviewing AI-powered engagement solutions.

1 Chat Bot Use Case

A critical first step to determining which chatbot is right for you is to understand your use case. Will you use the bot primarily for customer support or customer acquisition? Do you plan to have an agent facing bot to help customer facing employees be more efficient and effective? Or do you want to deploy a bot internally for employees to help with HR or IT needs.

Understanding how you plan to use the power of your bot can help you choose a solution that will best help you achieve your goals.



2 Natural Language Processing (NLP) Success

NLP facilitates conversations between chatbots and humans, where customers can ask questions in their own voice, rather than scripted phrases. Using NLP, AI chatbots create great customer experiences in conversational interactions, personalize responses to the customer based on what we know about them, provide answers, and facilitate real transactions.

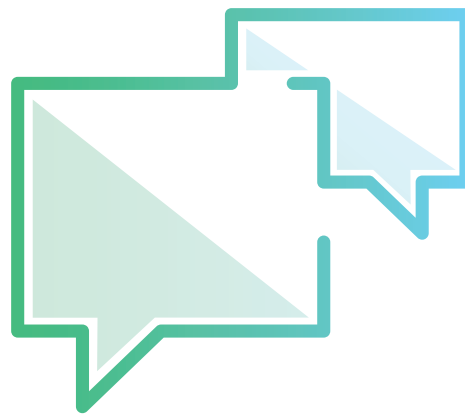
The result is tailored engagement outcomes that put the customer in the right next step. When looking at chatbot vendors it's important to understand how their NLP accuracy continues to improve and how you can strengthen its accuracy.



3 | Conversational vs. Scripted AI Approach

Chatbots are either limited to predefined scripts or have the intelligence to be more engaging with the context and content to make every conversation personalized. Customers can be provided different answers based upon account information, customer profile, previous answers, etc.

The bot can retain context throughout the conversation, creating a more human-like user experience vs. the more traditional scripted bots. During your evaluation process, know which type of conversations you want your customers to have while interacting with the bot.



4 | End-User Personalization Capabilities

Do you want to provide a generic experience for each customer, or go a more personalized route? By providing context-based, personalized answers to your customers, customers who ask the exact same question can receive different (relevant) answers based on segmenting information you have for each user.

For example, customers can be served different experiences based on the specific product or page they are viewing, their subscription type, etc.



5 AI and Agent Relationship

When adding AI to the mix, your customers have a great opportunity to self-serve. But what happens when they come to a dead-end and need to talk to a live agent, or in general prefer to talk to a live agent about an inquiry?

It's necessary to look at how you want them routed to a live agent, and what you want that relationship to look like. A seamless escalation from bot to live agent, where a customer doesn't have to repeat themselves, can create a great customer experience.



6 User Feedback Approach and Impact

At the end of the day, the goal of your AI-powered bot is to satisfy the people using it, so it's vital that end users can provide insights to improve overall performance of the bot.

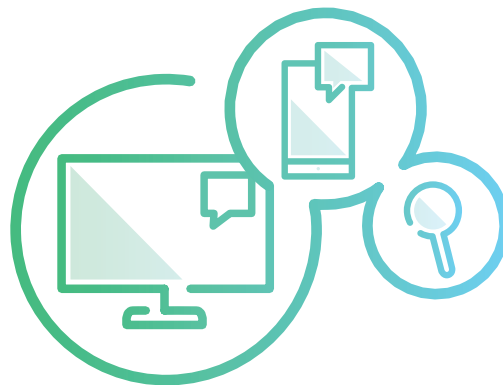
When examining different AI options, be sure to see what capabilities are available to gather this information. This could include the ability for customers to rate the usefulness of the content being offered or the agent to provide feedback to the knowledge base curator.



7 | Deployment Breadth

Before looking at different chatbot options, it's time to take a step back and think about all the channels you want to support as well as the different languages within these channels. This can include mobile, Facebook, WhatsApp, Microsoft Teams – the options are endless.

However, you don't want to pick a solution that can't support the channels you want to be in. You also need to understand how these different channels are managed and consolidated to make your agents more effective.



8 | Reporting and Analytic Capabilities

If you don't know how you're performing when it comes to customer experience, there's no way for you to know how to improve. Analytic capabilities can help drive better customer experiences and overall efficiency.

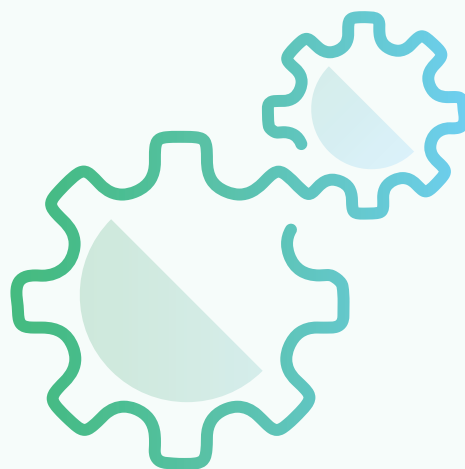
By knowing what your customers are looking for and where they're experiencing friction, you can immediately impact their customer experience. Be sure to understand what reporting and analytic capabilities are available in your AI solution.



9 Integration and API Approach

Is having a chatbot with out-of-the-box integrations and an open API platform important to your organization? Out-of-the-box integrations can help you get up and running faster, and open API platforms can allow you to quickly build your own integrations.

Categories and systems to consider include Help desk /Ticketing / CRM connections for seamless case submission and knowledge base access, Live Chat escalations, E-commerce connections for access to product and user information, analytic platforms, and syncing with other knowledge management software.



10 Implementation Experience & Ongoing Support

Taking on any new project can be overwhelming, especially with newer technology like AI. Luckily, there are plenty of vendors that help with the implementation process as well as support for the lifetime of your bot.

Chatbots might not take breaks, vacations, or holidays, but on occasion, they need support. Make sure you understand if you are offered 24/7 support, what the support SLAs are, and what continued success looks like.



11 Privacy and Security Measures

When dealing with customer information, it's always important to safeguard your operations with access to security options and permissions that put you in control of how your data is used and secured.

It's necessary to protect sensitive customer data and control user logins. Learn what steps different vendors take to ensure the security of customer and user data and know their applicable certifications.



Next Steps

Now that you have a better handle on topics and questions to ask when evaluating vendors, it's time to start the search.

In the meantime, learn how organizations like yours are seeing success with AI-powered chatbots.

[Learn more](#)