Customer Service AI Chatbots Need to Raise the Bar on Quality

Effective conversational customer service

Michael Monegan
VP Product Management, Cyara
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54% of US online consumers expect interactions with customer service chatbots to negatively affect their quality of life.

-- Forrester Infographic, Jan. 2019
Many Chatbots are either Simpletons Or Just Bad

Most projects wildly underestimate the complexity of testing chatbots.
A Gold Rush happens when similar optimists think the gold is just laying on the ground…
The Bot Problem Space

1. Modality: Voicebot vs. Chatbot
2. Multiple Digital Channels for Chatbots
   - Enterprise Website
   - Facebook Messenger
   - WhatsApp
   - WeChat
   - Apple Business Chat
   - etc.
3. Channel-specific efforts can grow into a Cross-Channel Bot Persona
4. Speed, speed, speed!
   • Adoption is driven by an expectation of efficiency, which we **must deliver**
   • Conversational is cool, but Customers just want to “get it over with”
   • Escalation to Agent with context needs to be fast and accurate
Enterprises struggle in a few key areas:

1. **Understanding** – Individuals want to be understood the first time, despite the many possible intents a customer base has

2. **Automation** – Common to find manual efforts that should be automated

3. **Testing E2E Connected Journeys** – omnichannel customer service
   - Web ► Chatbot ► Chat Agent
   - Whatsapp ► Chatbot ► Outbound Phone Call
   - Voice Call ► SMS ► Web page ► Chatbot ► Chat Agent
   - ...

Developing AI-based Bots: Common Pain Points
Chatbot Pain Points

1. **Understanding** – Intent/Utterance Testing produces trackable accuracy metrics for each intent

Example: Credit Card business unit of Retail Bank

“I want to make a payment of $300 from my checking account”

- **Intent Accuracy**
- **Correct Entity Value Capture**
  - PayAmount = $300,
  - PayAccount = Checking
Chatbot Pain Points

2. **Automation** – Development sluggishness stems from manual efforts
   a. Incomplete or old functional regression test suite
   b. Inadequate training data
   c. Inadequate testing data – not in optimal range of 10-100x more testing data
   d. No integration into CI/CD – no “build & test” or no “deploy & test” automation

Example Payroll/HR Bot project
- 60-85% coverage of intents
- Training data regularly changed for Watson
- Testing/Training Ratio in the 2-3x range
- API test cases but no end-to-end testing with web site and agents
Chatbot Pain Points

3. End to End Assurance
   a. Bot-to-Human Escalation: violations of “the right agent, right now” rule
   b. Incorrect context transfer, requiring customers to explain themselves again
   c. Disconnection of customer as journey adds or hops channels

Example roadside assistance project
   • 11 major systems integrated together to form solution
   • Stranding someone broken down on the side of the road? Disaster
   • Many trigger conditions that mandate a human agent within a few seconds
   • Journey initiation on Voice, mobile web and native mobile app
Why Not Create Bots to Test Bots?

Testing can be automated via a Customer Bot and a Customer Service Bot

- Sizable set of intents
- Broad range of entity values
- Variations in human expression
- Self-service options are becoming more consequential & risky
- Measure speed of response

There are, however, some risks:
Conversational Forces

- Gold-standard training utterance is perturbed by successive application of linguistic perturbations

"How do I transfer cash to retirement" → "Can I transfer cash to retirement?"

"Can I transfer cash to retirement?" → "How do I transfer cash to savings"

"How do I transfer cash to retirement?" → "How do I transfer cash to retirement"

"How do I transfer cash to retirement" → "How do I transfer money to retirement"
Machine-Generating Bot Conversations

- "Gold" Training Data
- Synthesized expected chat inputs
- Selected, cleansed chat inputs

- Generate Conversation Perturbations
- New Test Case Executions
- HITL: Review Test Results
  - Valid test case
  - Bad bot response

- Expanded Test Cases
- Expanded Training Data

Accumulated Guidance
Machine Learning Opportunities

• Conversational Variations
• Test Case Generation
• Coverage-directed phased test execution
• Popular Journey Sampling
• Root Cause Prediction
Building a Virtual Customer

Create a collection of Virtual Customers to cover every intent

1. Build a sparse coverage matrix: Intent by Persona

<table>
<thead>
<tr>
<th>Intent</th>
<th>Platinum Customer</th>
<th>Gold Customer</th>
<th>Silver Customer</th>
<th>Suspected Fraudster</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place order</td>
<td>SKU: 23 QTY: 40</td>
<td>SKU: 1021 QTY: 3</td>
<td>SKU: 441 QTY: 12</td>
<td>SKU: 441 QTY: 0</td>
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<tr>
<td>Order Status</td>
<td>OrderID: 23</td>
<td>OrderID: 78</td>
<td>-</td>
<td>OrderID: 78</td>
</tr>
<tr>
<td>Cancel order</td>
<td>OrderID: 23</td>
<td>-</td>
<td>Order: 313</td>
<td>-</td>
</tr>
<tr>
<td>Return order</td>
<td>OrderID: 21 SKU: 121 QTY: 10</td>
<td>OrderID: 622 SKU: 497 QTY: 1</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

2. Intent-specific tests advertise entity bindings
3. Success patterns for bot response documented in intent-specific test cases
Summary: AI-Powered Customer Experience Testing

• Combinatorics of intents, entities, workflows, styles of expression, and data-driven variations all point to a need for bot-like test automation
• New breeds of testers & tuners emerge to oversee more sophisticated testing
• Virtual Customers still have a lot to learn
• Success metrics are not the same for every chatbot team
  • Containment
  • Correctly routed
  • Intent Resolution
  • Customer Satisfaction (e.g., NPS)