Evolution of design guidelines for enterprise grade digital assistants

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Oracle
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Why guidelines?

Enterprise grade problems are problems of scale
Design decisions hinge on them
Set a quality bar and maintain it
Solving for scale

Picking the right use cases
How to create effective conversational experiences

Focus on intents that provide the most value
How to create effective conversational experiences

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Bonus Example
How many ways can you say “Dinner at Joe’s Eatery for $21.46 for a client visit”

100 Participants
- $21.46 dinner at Joe’s
- $21.46 @ Joe’s Eatery in Seattle for ClientName
- $21.46 at Joe’s Eatery, purpose client dinner
- $21.46 Dinner
- $21.46 dinner at Joe’s Eatery
- $21.46 dinner at Joe’s Eatery during client visit
- $21.46 dinner at Joe’s Eatery for a client visit
- $21.46 dinner expense at Joe’s Eatery for a client visit
- $21.46 dinner, joes eatery, Innovation Corp visit
- $21.46 Joe’s Eatery dinner
- $21.46 Joe’s expense
- $21.46 lunch Joe’s Eatery
- $21.46 Spent - Dinner 3rd Oct 2018
- 12/12/18, Dinner, 21.46
- 21.46 Dinner at Joe’s Eatery

244 Utterances

87% Unique
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Focus on intents that provide the most value
Design decisions

Making every word count
Design Example: Use unique info and reduce steps

Not this

Who is Richard Miller’s Manager?

I found several matches for Richard Miller. Choose one.
1. Richard Miller, Architect, Oracle Conversational Design
2. Richard Miller, Security Officer, Oracle facilities

Richard Miller, Architect, Oracle Design, reports to John Doe

Do this

Who is Richard Miller’s Manager?

I found 2 matches.
- Richard Miller, Conversational Design, reports to > John Doe
- Richard Miller, Facilities > Jane Smith
Design Example: Model user language; don’t make questions complex

Early
Which best describes the guests?
1. All Oracle employees
2. Government attendees
3. Vendors or customers

Next
Which best describes the majority of your guests?
1. All Oracle employees
2. Government employees
3. Vendors, partners or customers

Post Testing
Were all of your guests Oracle employees?
No
Ok, were any of them from the public sector (government)?
# Designing the ambassador for your brand: Digital Assistant Persona

<table>
<thead>
<tr>
<th>Personality traits</th>
<th>Psychographic traits</th>
<th>Personality attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The Guide</strong></td>
<td><strong>Thoughtful</strong></td>
<td><strong>Extrovert</strong></td>
</tr>
<tr>
<td>The Guide provides information and guidance, delivering just the right amount of expertise and encouragement</td>
<td>Exhibits consideration for the needs of its users</td>
<td>🟠🟢🟢🟢🟢</td>
</tr>
<tr>
<td><strong>The Trusted Colleague</strong></td>
<td><strong>Analytical</strong></td>
<td><strong>Humorous</strong></td>
</tr>
<tr>
<td>The Trusted Colleague will answer any question you have without judgement</td>
<td>A master of logical reasoning</td>
<td>🟠🟢🟢🟢🟢</td>
</tr>
<tr>
<td><strong>The Ambassador</strong></td>
<td><strong>Precise</strong></td>
<td><strong>Direct</strong></td>
</tr>
<tr>
<td>The Ambassador is always ready to represent the Oracle brand</td>
<td>Accurate in its expressions and detail</td>
<td>🟠🟢🟢🟢🟢</td>
</tr>
<tr>
<td></td>
<td><strong>Adept</strong></td>
<td><strong>Confident</strong></td>
</tr>
<tr>
<td></td>
<td>Able to converse and guide at any level of proficiency – from sales wizards to new hires</td>
<td>🟠🟢🟢🟢🟢</td>
</tr>
</tbody>
</table>

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Design: Keep help easy

**Not this**

Oracle:
I can help you with time off, approvals, payslips, company directory, promotions, internal job listings, salary adjustments, and savings contributions.
You can tell me things like, “look up an employee”, “vacation balance”, “my payslip”, or “my pending requests”.
You can cancel an action at any time by saying “cancel” or telling me what else you’d like to do.
If you need more help, just say “more help”.

**Not this**
An overabundance of information will quickly confuse the user, leading to possible task abandonment or long-lasting negative associations with the product.

**Do this**

Oracle:
I can help you with time off, approvals, payslips, company directory, and more.
You can tell me things like, “look up an employee”, “vacation balance”, “my payslip”, or “my pending requests”.

This
A new user may need an overview of capabilities as well as some sample commands to get started, but in moderation.
Setting the quality bar

Metrics that guide you
“file an expense for 67 bucks for dinner last night”

First turn utterance recognition accuracy
95% (+)

First turn utterance recognition accuracy
“how much did I spend on dinner last night?”

Intents handled
80% (+)

Intents handled
“Ok, here are your expense details...”

Conversational success rate
90% (+)

Conversational success rate
Takeaways

1. Don’t peanut butter: Get your most important cases working well
2. Be thoughtful and intentional in your language and channels
3. Start tracking your metrics even before day 1; benchmark and improve
4. Invest in your guidelines
5. Evolution of guidelines is natural: Start with a single instance
Tuesday Feb. 11:
9:15-10:00

Taking the Chatbot’s word for it? Trust with enterprise chatbots

Anna Wichansky & Sneha Kanneganti

1% inspiration, 99% perspiration:
Processing user utterances for enterprise chatbots

Anna Wichansky & Jayson Webb

Oracle Conversational UI Sessions at AVIOS 2020
Thank you

**Oracle Design**
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