



# So You Think You Want a Chatbot?

Asking the right questions to get the most out of the RFP process

EBOOK





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As the market for chatbots explodes and they grow more intelligent and capable, enterprises are racing to deploy them.

**But while the pressure to implement chatbots is intense, the fastest route to failure is to push out a request for proposals (RFP) when you haven't fully researched the topic.**

Before you begin the process of acquiring a chatbot, you'll want to anticipate needs and consider just what it is your organization is trying to achieve. What are your goals for your chatbot? How quickly do you need to achieve these goals? What kind of vendor can help get you there?

Organizations that have answered these questions and have gone on to successful chatbot deployments are already reaping enormous benefits—seeing their customer voice calls, agent chats, and email exchanges decline by as much as 70 percent while watching their customer satisfaction scores soar.\*

\* Steven Melendez, "Long Live the Chatbot: Mobile Chatterboxes Ready Their Next Assault," Ad Age, March 14, 2018, <http://adage.com/article/digital/long-live-bot/312692/>

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“  
A great VCA [virtual customer assistant, or chatbot] offers more than just information. It should enrich the customer experience, help the customer throughout the interaction, and process transactions on behalf of the customer.”

— Gene Alvarez,  
Managing Vice President, Gartner

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# 01

## What do you want from your chatbot?

**All chatbots are not created equal.**

In the years since Apple introduced Siri to the masses, advances in artificial intelligence (AI) technology have made virtual assistants even more intelligent and capable. So if you're only thinking about using your chatbot for FAQs, you might want to think again.

A chatbot can be critical to your enterprise (not just nice to have)—as crucial to customer experience as your website, contact center, mobile application, or brick-and-mortar outlet. This is because the interactive experience consumers have with your chatbot can have a major impact on their perception of your brand.

With this in mind, ask yourself the following questions before you begin assembling your chatbot RFP.

## How will you define success?

**Today's chatbots range from very simple virtual assistants whose primary function is to entertain, to intelligent virtual agents that can take care of everything from completing sales to handling complex customer care scenarios.**

Most enterprises require the latter. You'll want to figure out your immediate goals (e.g. increasing the percentage of customer journeys that are contained within digital channels or reducing customer abandonment) and then determine the type of chatbot that can address them. (Hint: Consult the following figure to understand the various levels of chatbot sophistication.)



### Informational

Understands natural language to provide answers to questions posed.



### Personalized

Presents user-specific responses by connecting to enterprise systems and clarifies user intent using menus or simple questions.



### Transactional

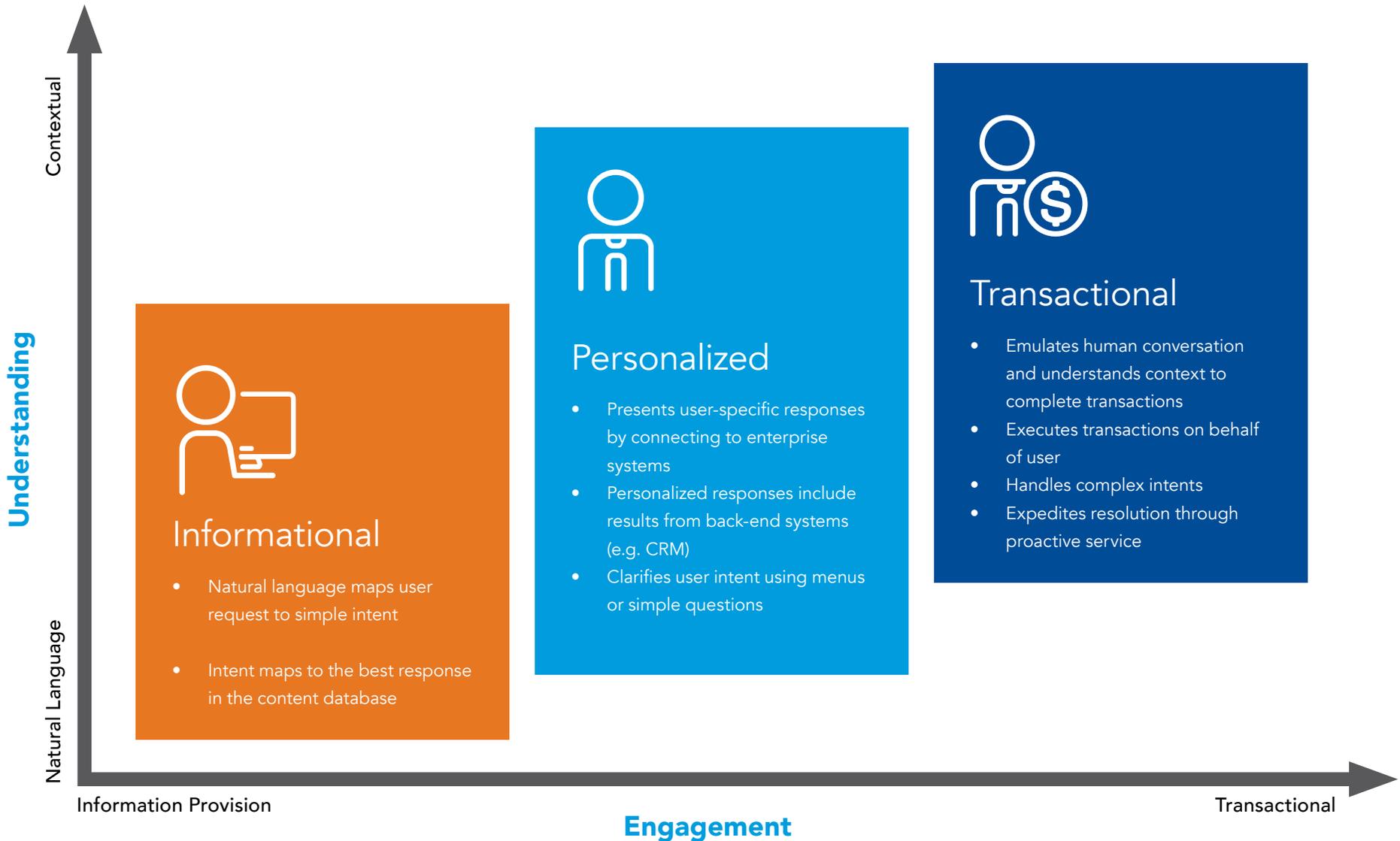
Guides the user through a series of steps to complete a task (can also be conversational) and can integrate customer data.

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## What can today's intelligent chatbots do?

- **Access statuses**
- **Recommend actions**
- **Understand customer intent**
- **Automate tasks**
- **Respond to text or voice commands**
- **Plan and schedule interactions**
- **Contextualize events within internal and external business processes**



### How quickly do you want to implement your chatbot?

You may have grand ambitions for your chatbot, but you don't have to fulfill all of them immediately. Decide on the timing that will deliver success for your initiative—whether it's three months, six months, or longer term—and then determine what you believe is achievable in that time frame and grow your chatbot from there.



### How will your chatbot keep pace with your evolving environment?

Your chatbot is unlikely to address every user journey right out of the box. Do you have the internal resources to continuously tune and expand your chatbot to keep it relevant and optimized? Or would you rather leave that task to the chatbot vendor?



### How will you integrate your chatbot with the rest of your IT environment?

Your chatbot needs to draw on information systems from across the enterprise and hand off transactions to human agents when the situation or user demands it. This requires seamless integration across multiple back-end systems.

## Determine which journeys would benefit from automation

**Define every customer journey and then collect and collate data on each to identify where customers are becoming frustrated—use tools like the chat system on your website to capture and learn about the issues of particular journeys.**

Once you have done this, you can determine which journeys to automate first by analyzing the frequency and complexity of each and identifying the high frequency/low complexity journeys that are good initial candidates for automation. In this way, you can develop a roadmap for chatbot automation.



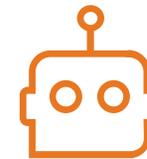
### What languages do you want your chatbot to support?

Many vendors claim that their chatbots offer multilingual, natural-language capabilities, but few offer true conversational understanding in a wide range of languages.



### How will you safeguard data collected by your chatbot and authenticate users?

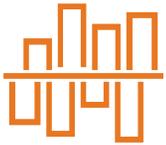
No matter how smart or intuitive your chatbot is, users will only interact with it if they're convinced their data will remain private. It's up to you to make sure the chatbot you select complies with standards in your industry and provides strong security and authentication policies.



### Where do you want to deploy your chatbot?

The best chatbots facilitate customer experiences across multiple channels—for example, enabling customers to start their journeys on mobile devices and continue them seamlessly through web and social channels. The trick is employing a chatbot strategy that doesn't demand that you reinvent the wheel for each channel.

## 01 What do you want from your chatbot?



### What types of analytics would be most insightful to further optimize your chatbot?

The true value of your chatbot will come from the powerful data it derives from customer intent—using myriad conversations and transactions to avoid misunderstandings and to provide insights into shifting needs and sentiments.

## 02 What do you want from your chatbot vendor?



### How will your chatbot predict consumer intent?

Understanding and predicting consumer intent requires more than just simple language processing. To succeed at these tasks, your chatbot's prediction engine will need to analyze a variety of factors, including user behavior, profile details, previous transactions, and more.

## 03 What should you embrace and what should you avoid in the search for a chatbot provider?



### Do you need an on-premise or a cloud-based solution?

Be sure to weigh all the pros and cons of each type of solution, and keep an open mind. An on-premise solution, for example, provides maximum control but requires your IT team to ensure ongoing maintenance, performance, scalability, reliability, and security of the chatbot environment. However, a cloud-based managed solution from a reputable vendor could be a better investment because it would accelerate deployment and eliminate the costs and overhead of everything from backups to failover, upgrades to performance monitoring, security measures to capacity planning, and more.

## Just how expensive is an on-premise chatbot?

### Here are just some of the other costs that come with an on-premise solution:

- Real estate
- Power
- Servers, hard drives & network equipment
- Personnel to manage
- Firewall
- Heating & cooling system
- Physical security system in and out of room
- Software maintenance/upgrade fees

## 02

# What do you want from your chatbot vendor?

**Just as not all chatbots are created equal, neither are all chatbot vendors.**

You will end up with a far better chatbot solution —and a far less painful and lengthy RFP process —if you narrow the field first by asking yourself the following questions.



## When should you use an RFI?

If you're new to the world of chatbots (and chatbot vendors), you may want to embark on a request for information (RFI) before you begin your search process. By explaining what you hope to achieve with your chatbot implementation and asking high-level questions focused on business objectives rather than specific capabilities, you'll get better information about a vendor's expertise and the right solution for your needs.

Best of all, you can accomplish your RFI goals quickly—email questions to a short list of providers and get responses in a week or two so you can narrow the field and craft the concrete questions you can use in your RFP process.



### Does your company have the resources to deploy and manage your chatbot?

If a vendor only offers self-install deployment of its chatbot and do-it-yourself optimization, integration, supervised learning, and other services to keep it performing at optimal levels, are you prepared to take on the cost and effort of doing the work yourself? A fully managed chatbot service means you don't have to hire people with specialized skills to deploy and manage your chatbot.



### What kind of post-deployment relationship do you want with your chatbot vendor?

Do you want a vendor whose relationship with your enterprise ends with the chatbot deployment? Or do you want a partner that will continue to update and support your chatbot as your business needs evolve?



## Why a do-it-yourself chatbot may not be your best option

Your enterprise likely employs a talented group of software engineers—most of whom could develop a chatbot if pressed. However, before you give any of them this task, take a step back and ask if this is really the best use of their time and talent. Are you willing to devote this employee (or employees) to maintaining, tuning, and training the chatbot over time so it can evolve with your business?

When it comes to do-it-yourself chatbots, these questions are just the beginning. You also need to consider that time to deployment will likely take longer (because you will be creating and integrating your chatbot from scratch) and that your chatbot will not likely be able to match the scope or intelligence of a vendor-provided one that's been trained across millions of operations and employs machine learning.

Unless all you want from your chatbot is super simple functionality, it's best to turn to a respected chatbot provider with extensive experience in your industry and your specific application.



### What is the vendor's track record in your industry and with companies of your size?

By choosing a vendor with substantial experience in your industry, you will gain a chatbot solution with abilities specific to your enterprise. As a result, your chatbot will begin to deliver value much more swiftly.



### How many vendors can your team thoughtfully research and consider?

Chatbot adoption is growing rapidly, and the nascent market is crowded with providers ranging from tiny startups to enterprise veterans. Because there's no way you can have a meaningful dialogue with all of them, it's best to determine at the outset how many you can fully engage with and then do your research to pinpoint those most likely to offer a suitable solution.

## 03

# What should you embrace and what should you avoid in the search for a chatbot provider?

**While chatbots represent a relatively new technology, they've been around long enough that your enterprise can benefit from the lessons learned and best practices adopted by other organizations that have already embarked on the chatbot journey.**

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## Want a faster time to value for your chatbot?

With technology moving at lightning speed, the three- to six-month (or longer) time frame for a typical chatbot RFP can seem like an eternity. If you're eager to begin deriving value from your chatbot sooner—and you're worried that a long RFP process could result in a solution that's behind the times before it's even been deployed—consider a pilot project instead.

A pilot project lets you hire a vendor for a relatively small budget and clearly stated objectives and deliverables so you can test-drive the vendor, its product, and your own working relationship with the company. Even if it doesn't result in finding your long-term chatbot provider, you'll at least have a better understanding of what you need.

## By following this simple list of dos and don'ts for enterprise chatbot RFPs, you can greatly improve your chances for success:

**01** Do narrow your list to a few respected chatbot providers.  
Emphasize experience with companies of your size and industry.

**02** Do prioritize your requirements.  
Ask all your decision makers to rank their priorities (into critical, nice to have, and extra credit) and then align them with your business needs.

**03** Do provide a 12- to 24-month roadmap and a phased approach.  
Indicate which channels, use cases, languages, etc., you want to support within a given period.

**03** Do provide vendors with sample data and tasks you want to automate.

Ask them to provide an analysis of what they can accomplish in the time frame you desire.

**04** Do permit vendors to ask questions.

Engage in meaningful and private dialogues so they can better understand (and serve) your business needs.

**05** Don't initiate the RFP process until all of your stakeholders are on the same page.

Reach consensus on which requirements are most important and best aligned with your business needs.

**06** Don't force vendors to guess what's important.

Do your homework and be willing to reveal your true objectives.

**07** Don't expect your chatbot to assist every customer journey from the first day of implementation.

Identify the first high-impact journeys that will provide the greatest benefits in the shortest period of time.

**08** Don't settle for a simple informational chatbot

Insist on what you really need: an intelligent enterprise-ready chatbot that can take advantage of sophisticated natural language processing, advanced AI and machine learning, and advanced analytics and insights to guide customer journeys to their most successful outcomes.

### The perfect RFP

**Answers** all of your product and vendor **questions.**

Provides a clear set of **decision milestones.**

Includes an accurate, **feasible deployment date.**

Details your **budget expectations.**

# Conclusion

Whether you decide to proceed immediately to a chatbot RFP or opt to pursue an RFI or pilot project first, you can thoroughly acquaint yourself with the world of enterprise chatbots (and the possibilities they afford) by reading [Opus Research Report: Decision Makers' Guide to Enterprise Intelligent Assistants 2019](#)

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