



CUSTOMER HANDBOOK

THE E-BOT⁷

QUICKSTART GUIDE



e-bot7 combines complexity with simple and extremely fast operation. The program interface is very user friendly. With the e-bot7 solution we manage to be there for our customers 24 hours a day.

A HAPPY E-BOT⁷ CUSTOMER

How to get started with e-bot7.

Chatbots and Conversational AI have been popular communication tools for businesses for several years. In the financial sector alone, chatbots will automate up to 90% of customer interactions by 2022*. Also, other industries are increasingly opting for AI-based chatbots, especially for customer support and lead generation.

According to a study**, 90% of the companies surveyed reported that customer complaints could be resolved more quickly through chatbots. But there are vast differences regarding the value a chatbot can add to the company. In contrast to rule-based chatbots, Conversational AI uses artificial intelligence. Hence, the AI learns with every conversation without predefined dialogue scripts and gets smarter with every customer interaction.

If you plan to integrate Conversational AI into your communication channels to deliver automated, natural conversations with your customers, e-bot7 is the right solution for you.

This guide provides you with an overview of the most crucial project steps and helps you to get your chatbot project going successfully and quickly and integrate Conversational AI into your company channels.

* <https://chatbotsmagazine.com/chatbot-report-2019-global-trends-and-analysis-a487afec05b>

** <https://99firms.com/blog/chatbot-statistics/#gref>

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Organisation.

Creating the necessary basis.

As with any project, you should define the respective roles on the e-bot7 platform. It must be clear who is operationally in charge of the project and who is responsible for the knowledge base, and thus the project's heart. Furthermore, only people involved in the project should have access to the console and knowledge base.

A managing director, for example, does not need a login if he does not work with it. At the same time, not everyone involved in the project needs all admin rights. On our platform, you can regulate this easily and individually via roles & permissions. While an admin has access to all functions and data, the editor can only expand the knowledge base. Furthermore, agents can only communicate with customers and cannot change the actual use case.

With the different permissions, you can be sure that no unauthorised person has access to the console and that all policies are adhered to.



Key takeaways.

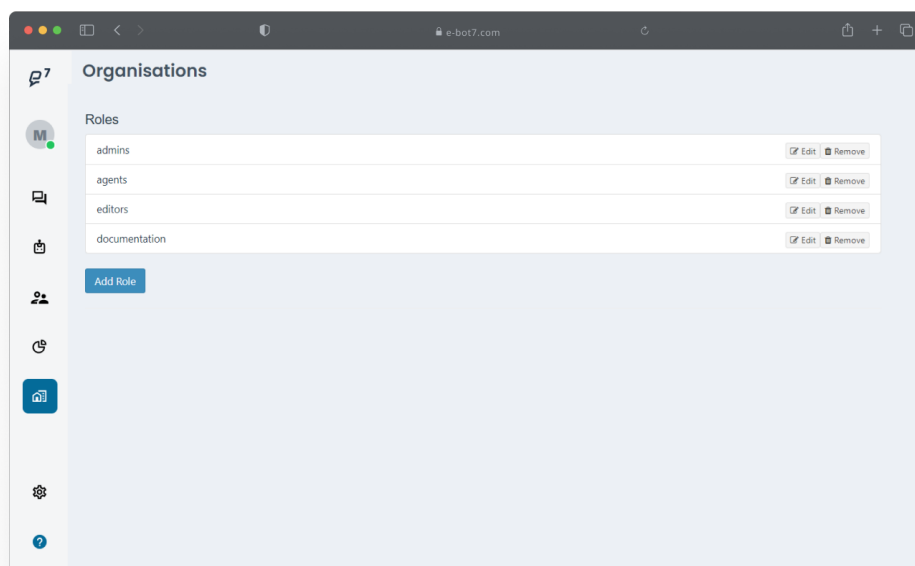
- Project responsibilities must be clearly defined and regulated.
- Only relevant people should have access to the platform.
- Permissions should be assigned to everyone individually.

Tasks & ToDo's.

Who will manage the project operationally?

Who is part of the project team, and who gets which admin rights?

Admin	Editor	Agent



Objectives & Channels.

Understanding your customers.

Users today have a clear idea of what they want from companies when it comes to communication. 24/7 service, fast response times and ease of use are essential factors contributing to a successful exchange. After all, customers don't want to be stuck in a phone hotline queue for hours or have to wait several days for an email reply.

Hence, new possible ways of communication with customers are created, including the use of chatbots. Before you can implement an AI-based chatbot and define a concrete use case, you first need to think about your customers' journey. Think about which channels your customers use to communicate with you and where potentials for improvement are. What would you like to optimise, and which processes can you automate?

Internal analyses are just as functional here as enquiries with colleagues. Listen carefully to your customers and use a customer analysis to find out which channels (e.g. e-mail, telephone, live chat) you prefer to use for the selected use case and which additional services you can offer. A Conversational AI is not only a contact person for problems (customer service) but can also support you with advice and sales (marketing & sales).

If you know which channels your customers prefer when communicating with you, you can consider in the next step which channels should become more efficient with Conversational AI. Regardless of how many channels you want to integrate the chatbot on, e-bot7 gives you the option to integrate the same chatbot on different channels. We make sure that it has the same appearance on each channel, as the design can also play an essential role in your chatbot.

Only if your design is appealing and the chatbot is easy to use will you get the traffic you want. Also, place your chatbot in a visible and easily accessible location, for example, on the homepage or contact page. Think about how you want to draw attention to the chatbot. You can do this, for example, via a designated chatbot-landing page, posts or ads on social media or information in the newsletter. Your customers must know that the chatbot exists and where they can find it.



Key takeaways.

- Choose channels for your chatbot that your customers also use.
- Internal analysis, conversations with colleagues and customer feedback can help to understand the customer journey.
- Place the chatbot in a visible location where your customer expects help, e.g. on the homepage or contact page.

Tasks & ToDo's.

Get an overview of your customers' journey.

What is your target group, and how do their customer journey look like?

Where are the current pain points along the customer journey and which can be optimised?

What goals and intentions are you pursuing using Conversational AI?

How do you make users aware of your chatbot?
(e.g. own landing page for the chatbot, announcing it via social media)

Implementation.

Defining the first use case.

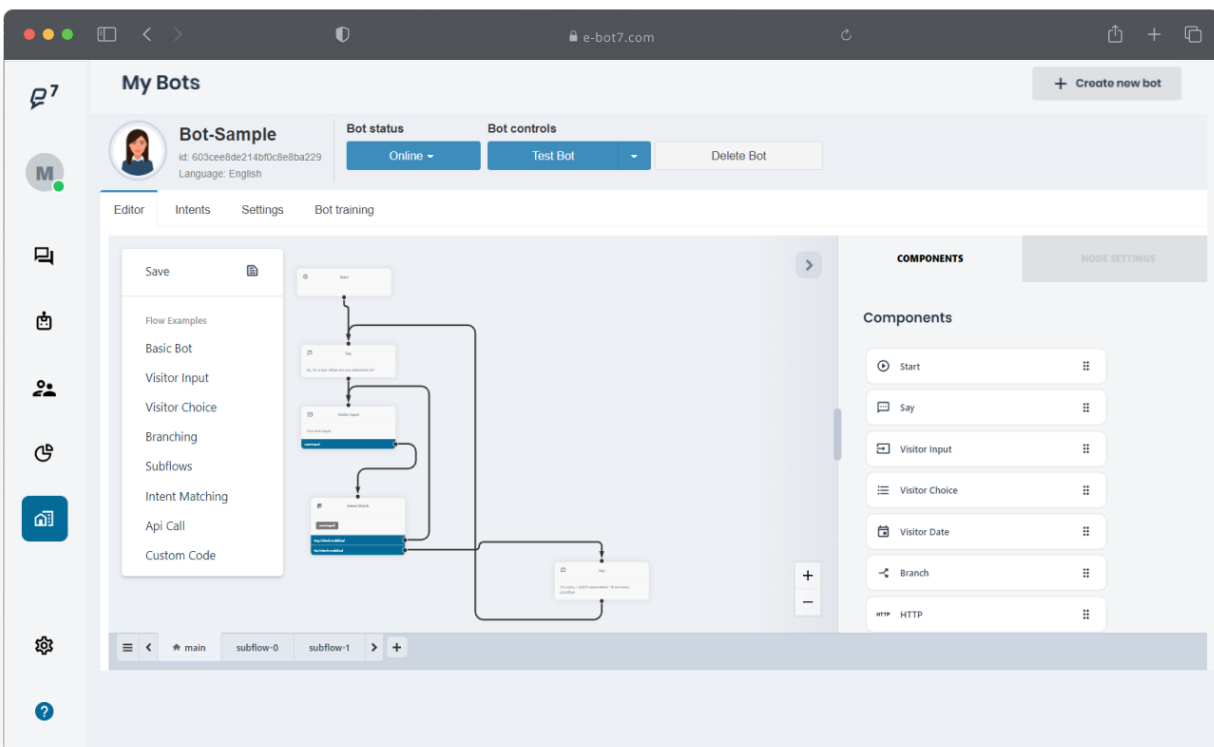
Once you have an overview, you can create your first use case via our flow editor. The Flow Editor is a further development of our previous Contextual Dialogue Editor. With this, you can graphically represent a use case and build a conversation, so-called flows, which users can later access via the chatbot.

When designing and developing flows, the most important thing is the intentions you want to pursue with the use case. You can use the Intent Library to define your preferences and determine the respective use case's goal. The Intent Library is the central system for managing intentions and default actions (i.e. actions that should be executed when an intent match occurs). Specifically, editorial content such as phrases and the bot's responses are maintained here.

Whether a use case is successful is ultimately shown by the traffic and the extent to which other channels (e.g. telephone or email) are relieved. Once a meaningful use case has been identified based on the customer journey and established on your desired channel, customers will also use Conversational AI.

Depending on the use case, you should also consider whether customers should only be able to communicate with the chatbot or whether there should also be a live chat function. This means that in addition to the chatbot, during certain hours (e.g. from 8 a.m. to 8 p.m.), a support employee is available to take over the conversation at any time.

At e-bot7, we call this hybrid combination of live chat and automated chat Agent+AI®. The advantage here is that the AI already answers a large part of the queries automatically and the agent only has to deal with complex cases. If you already have several potential use cases in mind, you can also combine them.





Key takeaways.

- Know what problem you want to solve with a particular use case before defining it.
- Find out whether a use case is successful by measuring KPIs and whether other channels are relieved.
- Choose between a fully automated chat and the hybrid solution Agent+AI[®], which combines the best of chatbot and support agent.

Tasks & ToDo's.

Define your first use case.

What should users do with the chatbot?
(e.g. contact support)

What are your intentions for this use case?
(e.g. intercept all customer requests)

When should the chatbot be available?
(e.g. 24/7, only during office hours)

Is there a support team or is the chatbot completely automated?

- ☐ Support Team
- ☐ Fully Automated

Quick Start.

The easy way to train your AI.

The advantage of Conversational AI is the artificial intelligence behind it. While simple, rule-based chatbots can only follow predefined scripts, AI-based chatbots understand both language and spelling mistakes and draw on your knowledge base. If you have already stored FAQs or relevant data here, the chatbot can answer these questions right from the start.

You can also go live with your chatbot without having a lot of data in your knowledge base yet as you can train the chatbot very quickly. While the agents chat with users, the bot learns automatically. Moreover, you can check at the same time what the agents are training the bot to do and adjust it if necessary.

You can also decide from which confidence level on the bot should answer questions automatically. For example, with a defined confidence level, you can specify that your chatbot only answers questions where it is over 95% sure that the answer is correct.



Key takeaways.

- AI-based chatbots draw on a knowledge base and learn automatically with each conversation.
- Define what the chatbot should and should not learn from conversations between agents and customers in the console.
- Set a confidence level from which the chatbot answers questions independently.

Tasks & ToDo's.

Define your first use case.

How often do you plan to review & update the knowledge base?
(e.g. weekly)

What data do you already have that could be relevant for the chatbot?
(e.g. FAQs, documents, etc)

What rich content could you include in the knowledge base to make the chatbot experience more appealing for users?
(e.g. videos & images)

Integration.

Go live with your chatbot.

Once you have defined your use case and displayed it in the flow editor, the next step is to go live. On our Conversational AI platform, this process is straightforward and fast. You don't need any technical background for this but can embed the JavaScript snippet directly in the URL via which the chatbot is accessible.

Besides the standard integrations for website and app, we have developed further integrations for our clients' most popular programmes such as Salesforce, Jabber and Microsoft Teams. Our in-house integration team can also create additional front-end and back-end integrations as needed.

For example, suppose you want to offer personalised support to your visitors. In that case, it is possible to identify users for personalised communication with a suitable back-end integration into your CRM system.



Key takeaways.

- The launch of the chatbot is quick and easy with e-bot7.
- You do not need any technical background for the integration.
- In addition to standard integrations for your website, such as Facebook and WhatsApp, e-bot7 also offers individual interfaces/integrations.

Tasks & ToDo's.

Select the relevant channels and define the chatbot design.

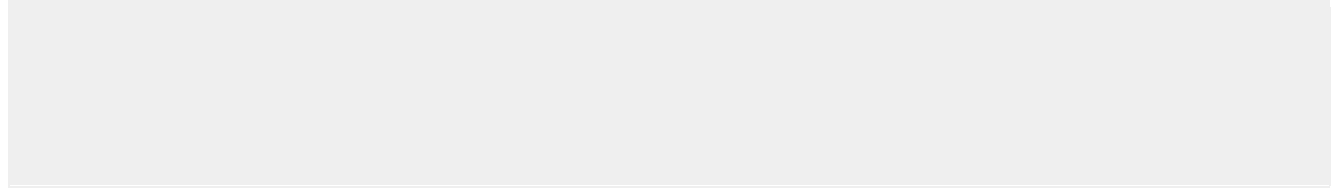
On which channels do you want to integrate the chatbot (please tick)?

- ☐ Website
- ☐ Facebook
- ☐ WhatsApp for Business
- ☐ Salesforce
- ☐ Zendesk
- ☐ Jabber
- ☐ Microsoft Teams

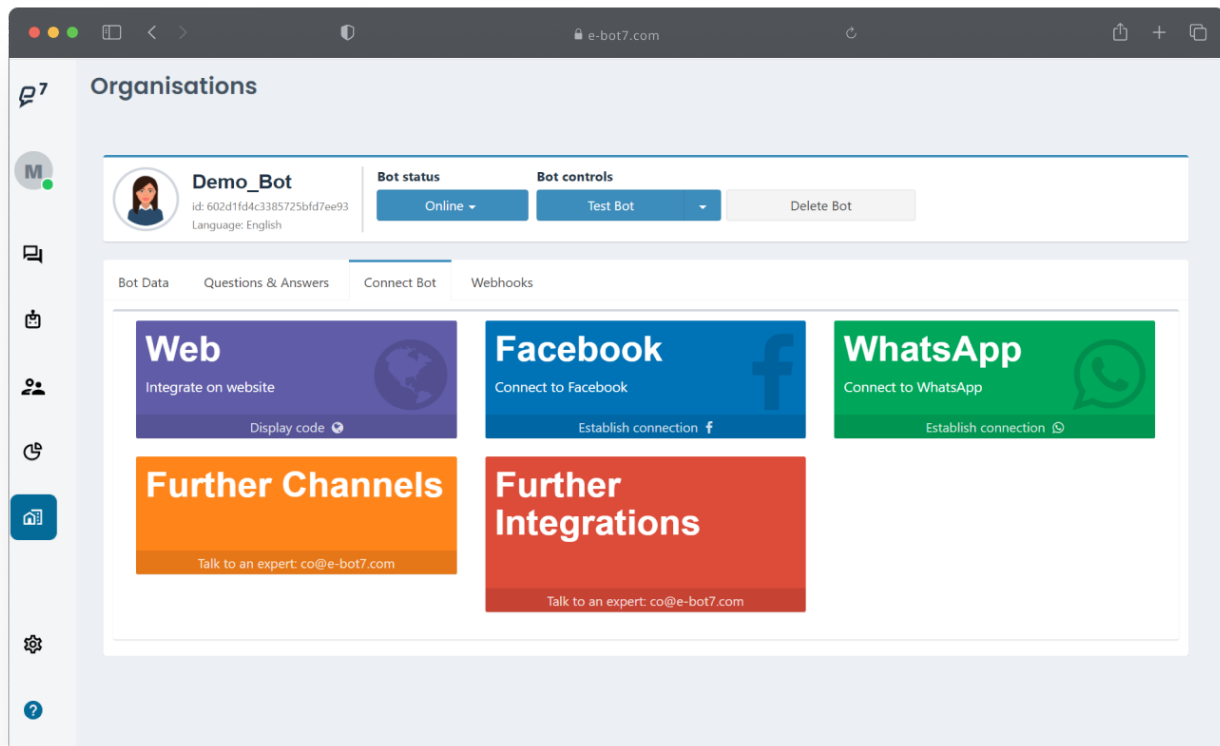
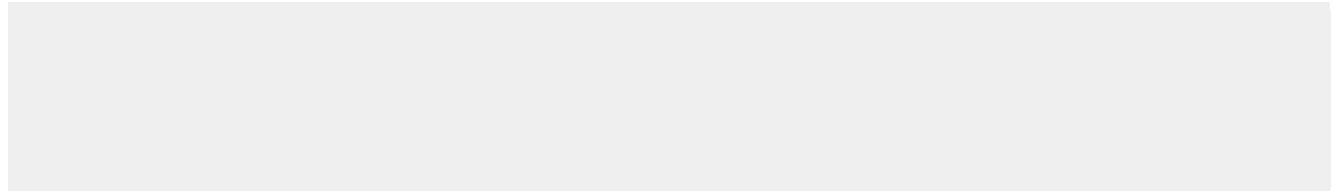
Are there any other channels you would like to implement the e-bot7 chatbot on?

How should the chatbot be integrated on the respective channel?
(e.g. chat bubble in lower right corner, contact page, etc.)

How should users be made aware of the chatbot?
(e.g. chatbot automatically greets users after a particular time)



What should the chatbot and chat window look like?
(e.g. company logo or avatar, colours, header or footer in chat window)



Reporting.

Analyse traffic and feedback.

Only what gets measured gets managed! That's why we not only help you set up a chatbot successfully but also provide you with the relevant information to improve it continuously. The better you get to know your customers by analysing the data, the better you can design your service.

The analysis of your chatbot success primarily includes the relevant KPIs and key figures. However, to make the best use of the dashboard, you also need to know your goals. Take a look at all the metrics in our dashboard and define the relevant metrics. Once you have determined this, you can track your goals regularly. If you have any questions, your technical account manager will be on hand to help you continuously improve your chatbot.



Key takeaways.

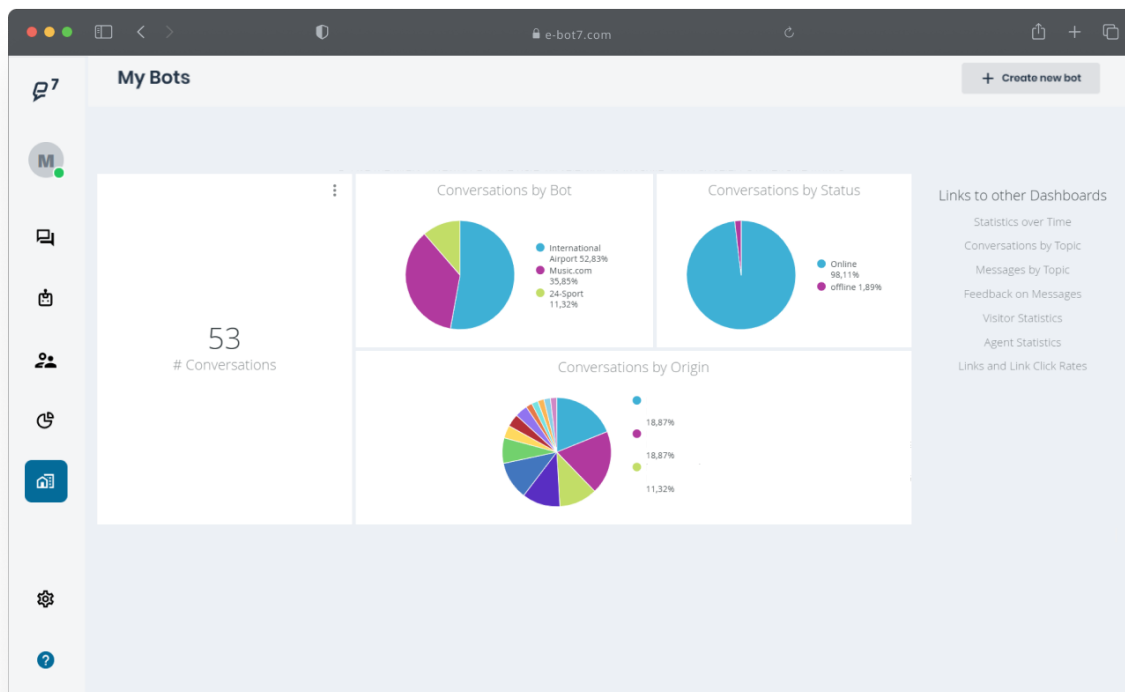
- What gets measured gets managed.
- We provide you with the relevant data to continuously improve your chatbot.
- Learn to understand your customers' needs better with the correct data and metrics.

Tasks & ToDo's.

Think about what you want to analyse.

What goals are you pursuing with the chatbot (cf. chapter 2)?

Which key figures do you want to measure?



Generate additional potential.

Create further use cases.

If your first use case works, you can think about other areas of application for the chatbot. Other use cases can apply to new markets or other departments. Our Customer Success Team supports you in the search for new potentials and offers suggestions for improvement.

By working with over 100 customers and the resulting chatbots, we know what is essential for an AI-based chatbot to have added value. We analyse your business and get an understanding of your customers to show you new potentials. This way, you can get the most out of your chatbot project.



Key takeaways.

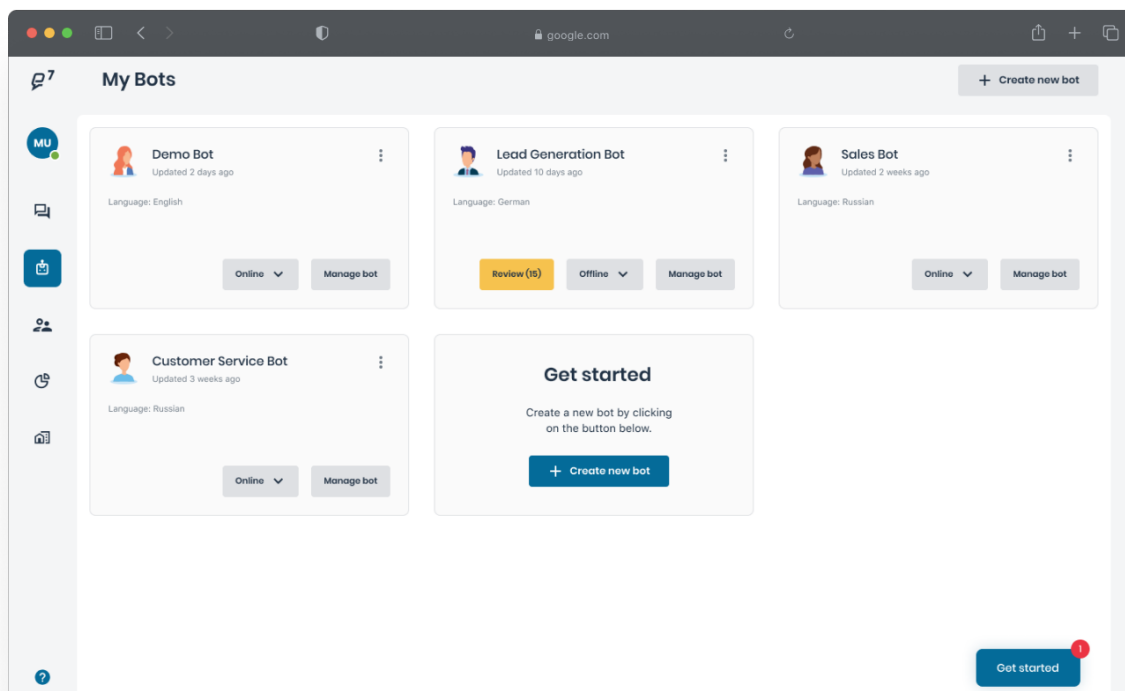
- After the first use case, think about other areas of application for your chatbot.
- The e-bot7 team supports you in your search for new potentials.
- As an experienced provider, we are familiar with the diverse possibilities of new markets, regions, and departments.

Tasks & ToDo's.

Think about other use cases.

Where else can you use the chatbot?

What other tasks and processes can the chatbot automate?





When used correctly,
chatbots enable better
customer service, increase
employee satisfaction, and
bring potential cost savings.

With e-bot7, you can implement your chatbot project quickly and easily, even without extensive technical know-how, and benefit from the leading Conversational AI platform.

What are you waiting for? Start today.

Clients.

Miele



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HDI



Let's talk.

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