Virtual Assistants

10 Deployment Tips
eGain had commissioned an external research agency to identify the critical factors that determine the success of a virtual assistant (also popularly known as virtual agent or chatbot). The top 10 tips derived from the study are presented in this paper.

Top 10 deployment tips

**Tip 1**  Have the virtual assistant constantly, but unobtrusively, available on the screen. Consumers clearly preferred an agent that was globally available at the site, at any time and on any page. “Burying” the agent in a Help section was not well received. Many individuals in the study had made it a practice never to click on Help buttons because of negative experiences in the past.

**Tip 2**  Put the virtual assistant near the top of the screen, but not at the very top. Consumers have been so conditioned to expect advertisements at the top of the screen that they are likely to confuse the chatbot with a banner advertisement.

**Tip 3**  If screen real estate is so limited that the virtual assistant must be reached through a button, place that button near the top of the screen and label it clearly.

**Tip 4**  Avoid pop-up windows. Consumers reacted negatively to a virtual assistant window that obscured other windows.

**Tip 5**  Make sure the text box is either large enough to contain a typical query, or that the text scrolls as the user types, so that users can easily see everything they’ve written.

**Tip 6**  If the virtual assistant refers visitors to a particular page, provide a link that takes them directly to that page. Don’t require them to navigate in order to find it.

**Tip 7**  Be tolerant of common grammatical and spelling mistakes. Queries need not be rephrased because of unintentional typing errors.

**Tip 8**  Make sure that the virtual assistant “knows its limitations,” and that there is a mechanism to escalate the inquiry to a source, either online or offline, that will be able to provide a satisfactory answer. Typical options include online chat with a live person, the email address or toll-free number to a contact center or, at minimum, a list of alternate self-service resources.
Tip 9  Provide adequate infrastructure so that issues such as bandwidth or internal processing time does not slow the virtual assistant’s response time. One of the main reasons consumers like virtual assistants is their speed.

Tip 10  Be polite! In particular, phrase error messages so as not to antagonize customers who are already frustrated because they’ve made an “error.” The following error message was perceived as bordering on rudeness: “Please, one idea at a time. You don’t have to say everything at once. I can help you better if you ask fewer questions.” A more polite version would be, “I’m sorry, but that is a rather complicated request. If you could break it up into a series of simpler questions, I would be able to provide better assistance.”

Next steps
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