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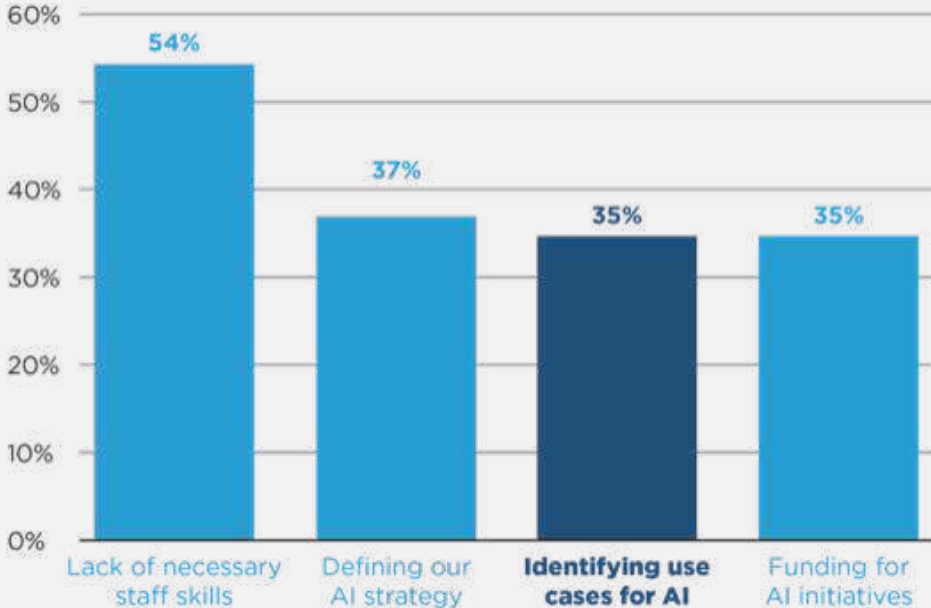
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*How to Select
the Right Use Cases
for AI Chatbots*

Background

Top Three Challenges in the Use of AI

Percentage of Respondents

Bar chart:
- Lack of necessary staff skills: 54%
- Defining our AI strategy: 37%
- Identifying use cases for AI: 35%
- Funding for AI initiatives: 35%

Base: n = 83 Gartner Research Circle members; showing top three challenges only.
Q08. What are the top three challenges to the adoption of artificial intelligence within your organization?
ID: 333850   © 2018 Gartner, Inc.

AI is fast becoming vital for organizations that want to improve customer experience. According to Gartner, "Through 2020, AI use cases supporting customer experience are forecast to deliver the most business value, followed by new revenue growth thereafter."[1]

However, one of the top three challenges to adopting AI is difficulty in identifying use cases and quantifying the business value that AI will bring.

[1] Gartner "How to Use AI to Improve the Customer Experience" by Analyst Melissa Davis, 11 April 2018.

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Candidate Use Cases for AI Chatbots

Key Characteristics of Initial Use Cases for AI Chatbots

- *Influences customer experience*
- *Measurable impact*
- *Automates low-value transactions*
- *Easy to automate*
- *Has an executive champion*

Who to Involve in Use Case Selection

- *Engage a cross-functional team when reviewing options. This will help identify use cases with broad appeal as well as bolster support for the project.*
- *Groups that should be engaged are:*
  - *Sales and Marketing*
  - *Product*
  - *Operations*
  - *Customer service*
  - *IT*

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Candidate Use Cases for AI Chatbots

Ideas for Initial Use Cases

Customer Service

- *Cancellation/refund requests*
- *Payment/billing issues*
- *Points/rewards redemption*
- *Service disputes & complaints*
- *Safety issue reports*
- *Order status requests*
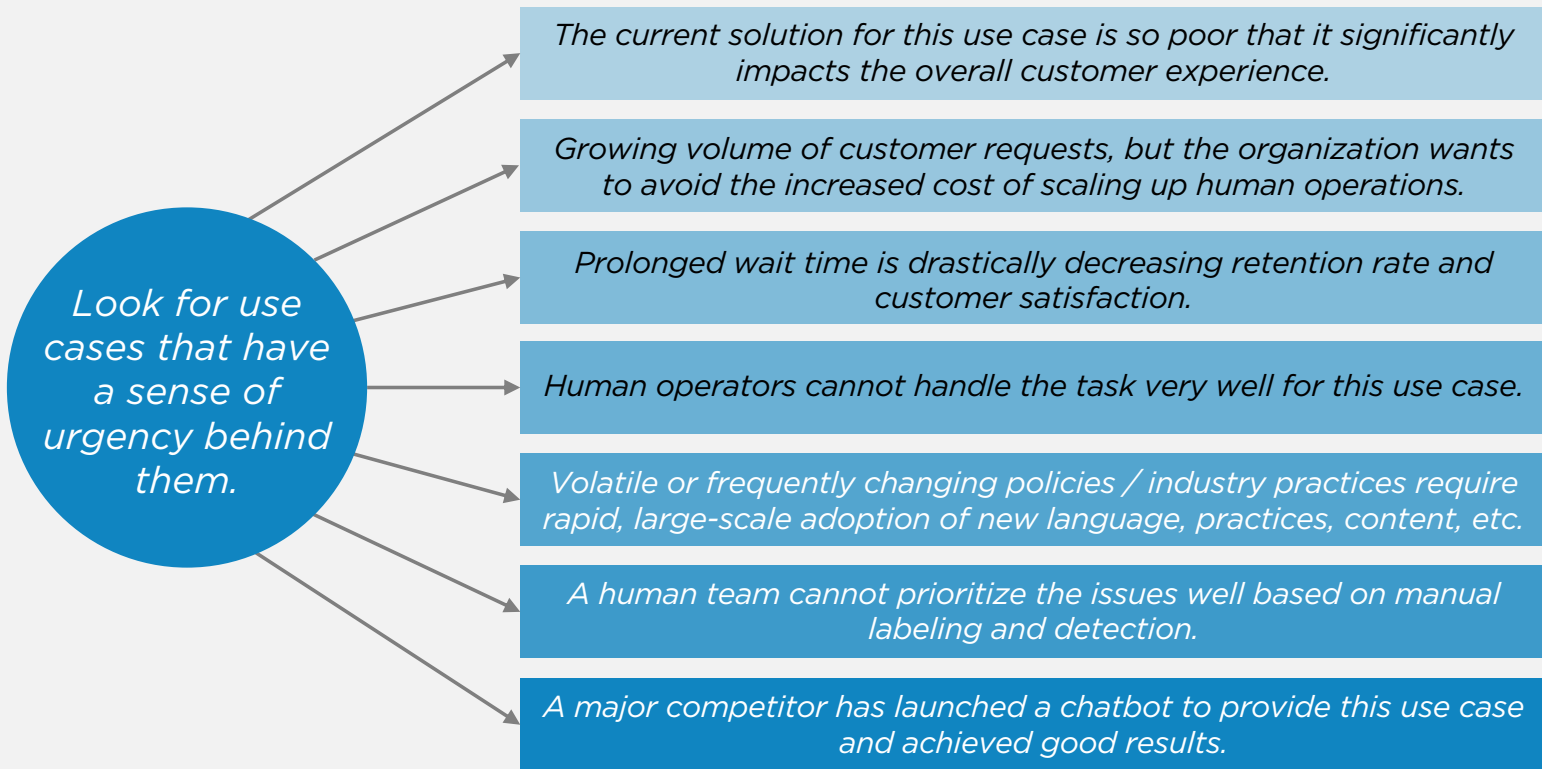- *Supply chain inquiries*

Sales & Marketing

- *General education*
- *Product detail*
- *Recruiting and onboarding*
- *Landing page conversion*
- *Lead qualification*
- *Increased engagement*
- *Partners/affiliates*
- *Product promotions/ recommendations*

Internal Help Desk

- *IT support*
- *Employee/benefits*

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Urgency as a Driver for Deployment

Look for use cases that have a sense of urgency behind them.

- The current solution for this use case is so poor that it significantly impacts the overall customer experience.

- Growing volume of customer requests, but the organization wants to avoid the increased cost of scaling up human operations.

- Prolonged wait time is drastically decreasing retention rate and customer satisfaction.

- Human operators cannot handle the task very well for this use case.

- Volatile or frequently changing policies / industry practices require rapid, large-scale adoption of new language, practices, content, etc.

- A human team cannot prioritize the issues well based on manual labeling and detection.

- A major competitor has launched a chatbot to provide this use case and achieved good results.

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Quantifiable Benefits

For long-term success, it is critical to measure business outcomes related to AI chatbots. In order to measure the benefits of an AI chatbot deployment, you need to develop a set of key performance indicators (KPIs) that align with corporate goals.

- New Revenue
- Cost Optimization
- Customer Experience Enhancements
- Time to Resolution
- Retention Rate
- Goal Completion Rate
- Customer loyalty and Advocacy Improvements
- KPI

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Quantifiable Benefits

Establish KPIs

It is recommended that you work with the cross-functional team that identified the use case in order to establish KPIs that are meaningful and that can guide updates and upgrades to the chatbot
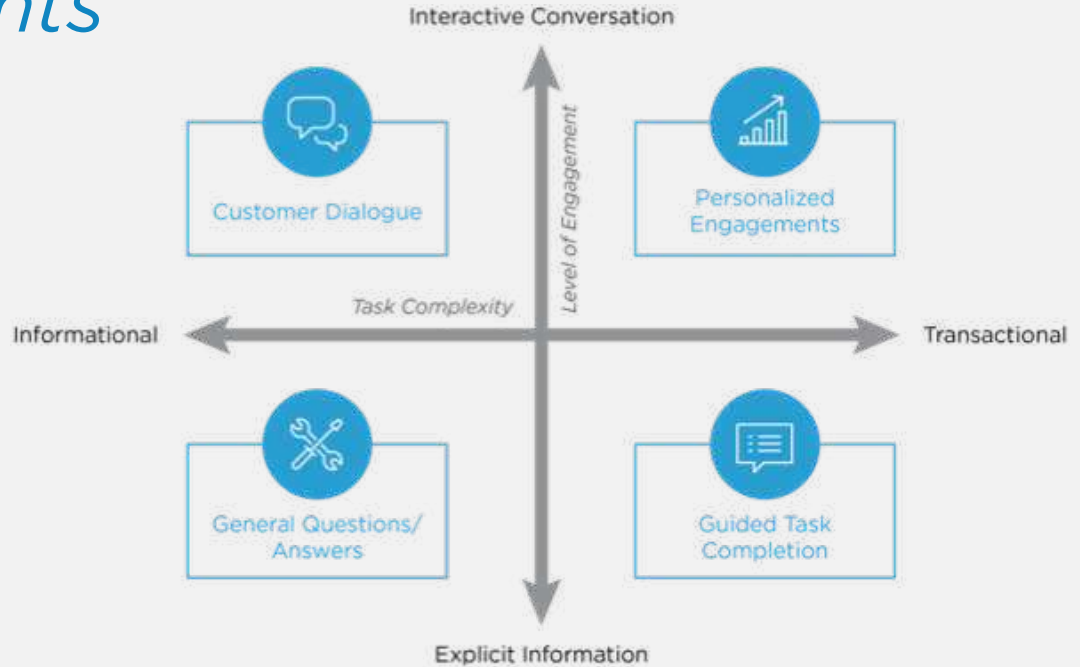
Consider customer and organizational visibility

- *What's the projected volume for the candidate use case?*
- *Is this one of the core pain points that the organization is facing?*
- *Would this project enable other strategic initiatives by boosting efficiency, freeing up resources or eliminating a bottleneck in your company?*
- *How many internal employees will be exposed to the impact?*
- *What is the estimated level of automation desired to achieve*

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Implementation Cost and Resource Requirements

The implementation scale and complexity will impact the time and cost required for an AI chatbot deployment. For initial chatbots, it is best to start small. This provides an opportunity to get a working chatbot deployed and delivering results more quickly.

Interactive Conversation

Level of Engagement

Customer Dialogue

Personalized Engagements

Task Complexity

Informational

Transactional

General Questions/ Answers

Guided Task Completion

Explicit Information

Once deployed, chatbots that were built on the Rulai platform can be upgraded to support more personalized engagement through interactive conversation and transactional tasks.

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Backend Integration & Availability of Data

Depending on its design, your chatbot may require access to different data sources and integration points to accomplish different tasks and actions. We find that having one IT person/engineer who can help with the integration/implementation is typically enough.

For each use case, the following sequence of technical questions need to be addressed:

❖ *Does the use case require backend API integration (to obtain an account balance or cancel an order, for example)?*

❖ *Is an existing API available?*

❖ *Can the API be accessed easily for the chatbot to call?*

❖ *Does the use case require automation logic on the backend?*

❖ *Has the automation logic been implemented on the backend?*

❖ *Can the automation logic be accessed via a RESTful API?*

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AI Chatbot Use Case Evaluation Matrix

PROJECT:	PROJECT MANAGER:
CREATED BY:	LAST UPDATED BY:
DATE CREATED: MM/DD/YYYY	DATE LAST UPDATED: MM/DD/YYYY

Use Case	Urgency	Benefits	Cost	Efficacy	Integration	Visibility	Sponsor	Rank
1.								
2.								
3.								
4.								
5.								

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Thank you!