



ARTICLE

6 Simple Steps for Designing a Winning CX

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Have you ever been in a department store where it was impossible to find someone to help? Chances are, no matter how good the products or service, your impression of the store was just as easily influenced by the experience leading up to customer support.

This is similar in the world of chatbots. In addition to thinking about the in-bot content – such as what a bot should say and how the conversation should flow – it's just as important to consider the rest of the journey. For example: is the bot easy to find? Can customers understand what the bot is used for? What was their path like to get there? This space is often overlooked but the answers can significantly drive bot engagement and customer satisfaction. After all, the journey starts well before the customer engages with the bot at all.

When our clients reached out to us for expertise on how to create a best in-class digital experience, we audited diverse customer websites and platforms to understand common pain points or areas of great customer experience – and the results were astonishingly simple. We want to share our findings in 6 simple tips to help you drive a great customer digital experience and make online assistance seamless.

Map Out Customer Journeys

As you're building out your chatbot, it's important to plan out how you will integrate your bot into your communication channels.

Before you decide where your bot will live, and how it will fit into the rest of the customer experience, consider the varying journeys your customers take. How can you ensure your bot supports each customer journey?

For example:

- Can the bot reach out with recommendations when customers browse for products?
- Can the bot help with payment issues on the billing page?
- Can the bot help with troubleshooting?

By doing this exercise, you'll be able to map out the most optimal entry points to your chatbot and decide on how the bot can engage with customers. This will help you put your customers first and ensure you can make the most of your bot across the entire customer experience.

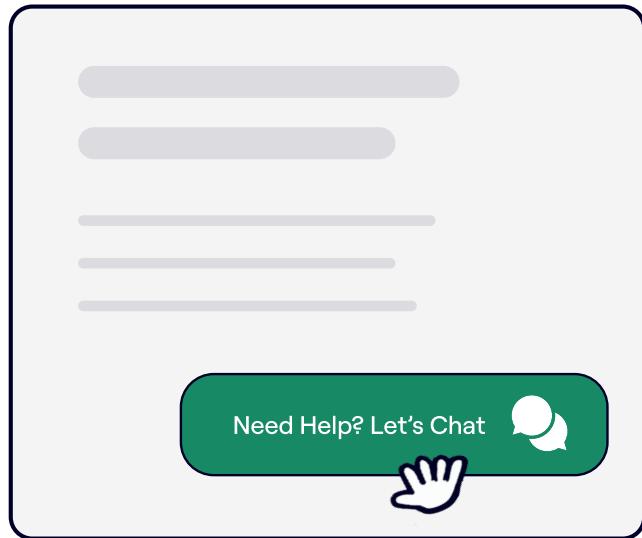
Easy Wins:

- ① Make sure your bot is available on pages where your customers currently go to access support resources.
- ② Consider making the bot more visible in areas where customers might encounter points of friction, such as login pages, account cancellation, and billing.
- ③ Lastly, list your bot as a top support channel on your contact page and social media so that customers can get in touch without calling!



Use a Familiar & Accessible Chat Button

Your chat button should be easy to identify and consistent across your platform. The key is to choose something visually familiar and accessible across different touch points, so your customers won't have trouble finding it.



For example, wherever you place a chat button, add a recognizable help icon. If you're using a navigation link that leads to the chat, keep this pattern consistent across different screens and devices. Create a visible section that highlights your chat on your platform instead of linking to the bot discreetly. To make sure customers with disabilities can just as easily use the chat, follow the W3C accessibility guidelines when designing the experience.

In web view, we recommend adding a familiar chat bubble in the bottom right corner of the screen. This is likely where customers will look for an online chat, and the consistent location will make it easy to find when navigating across different screens. Ensure the button is easy to spot by using a contrasting color and familiar support icon, which you can configure in the Ada Chat settings.

Brand Appropriately

Branding your chatbot can make the experience feel personalized, polished, and even fun, but the wrong branding or too much branding can run the risk of confusing customers and reducing clarity — negatively affecting engagement and customer satisfaction. With your branding, it's important to:

- Clearly communicate the idea of "customer assistance" and "online chat" through the design and messaging. Try to avoid content that is too ambiguous or appears too much like advertising.
- Design your bot's persona to match your very best support person. Ensure that personality doesn't get in the way of being helpful, clear, and approachable.
- Use a simple and friendly image or logo for your bot's avatar. Steer away from using an avatar that is too "human-like," which can set the wrong expectation or feel uncanny.



Provide Proactive & Contextual Help

Something magical happens when customers get the help they need...before they even ask for it. To create this kind of seamless experience, meet your customers where they are by providing proactive and contextual help. You can do this in two ways with your bot:

- ① Tailor how your bot will engage with customers depending on where they are on your platform or website. To do this, set up Proactive Intros and choose what answer the bot will follow up with once the customer opens the chat.
- ② Drop customers directly into a specific bot flow by adding a custom **Embed2 Greeting**.

As an example, if a customer is on a billing page and payment is a common issue, you can proactively reach out and ask "Need help with paying your bill?". The customer can then click on the chat and go directly to the payment flow.

Set expectations

Not everyone has used a chatbot before! Help customers get the lay of the land and make the most of your bot by setting expectations before they open up chat.

Start by providing an example of how to use the chat, such as "Try asking me about x, y, or z" and let customers know that they're speaking to a bot and not a human.

Another strategy is to list out some common or complex tasks your bot can help with, which your customers might not even be aware of. This is especially helpful if you've identified the top use cases for your bot. If your bot can handoff to a human agent, letting customers know about that capability can help them feel more confident in using an online chat.

Highlight the benefits of automated support

Automated support is the way of the future. Help customers understand the value of using a chatbot by highlighting some of these key benefits in your messaging:

24/7 SUPPORT AND ASYNCHRONOUS CHAT

No more waiting like with traditional phone support or email. Get assistance whenever needed.

REDUCED AGENT WAIT TIME

Automated routing reduces the time it takes to transfer to the right agent.

REDUCED AGENT HANDLE TIME

Agents can quickly understand the issue from the bot conversation before jumping in, eliminating the need for you to repeat information.

FASTER RESOLUTION

Get complex issues resolved immediately and on your own.

OMNI-CHANNEL SUPPORT

Chat wherever it's convenient and get help on the go.

MULTILINGUAL SUPPORT

Easily get assistance in a preferred language.



Design a best-in-class digital customer experience with Ada.



Let's talk →

As the market leader in Automated Customer Experience (ACX), Ada is the only chatbot platform purpose-built to support an automation-first customer experience strategy.

By diminishing dependence on IT and uncovering new opportunities for revenue, Ada's automation is designed to transform the support model from a cost center to profit center. Headquartered in Toronto, Ada enables clients around the world, like TELUS, AirAsia, Zoom, and UpWork, to put automation and AI at the front end of their customer experience strategy, thereby freeing live support agents to have greater impact.

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