VOICE DESIGN

AT ALLSTATE

Amy Roark - Multi Modal Designer

IN THIS SKETCH: CONVERSATION DESIGN ASPECTS FOR BOTH VUIs & CHATBOTS.

DESIGNING A CONVERSATIONAL UI

PART 2

PART 3: CHATBOT-DESIGN
PART 4 VUI-DESIGN

UX Knowledge Base Sketch #86

©KRISZTINA SZEROVAY
WWW.SKETCHINGFORUX.COM

A NEW ROLE: CONVERSATION DESIGNER
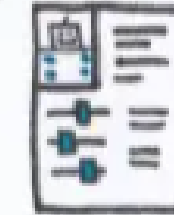
USERS TEND TO HUMANIZE TECHNOLOGY + THEY RESPOND TO IT AS THEY'D RESPOND TO HUMANS

ANATOMY OF A CONVERSATION:

USER INPUT → ANALYZING/ PROCESSING → SYSTEM OUTPUT
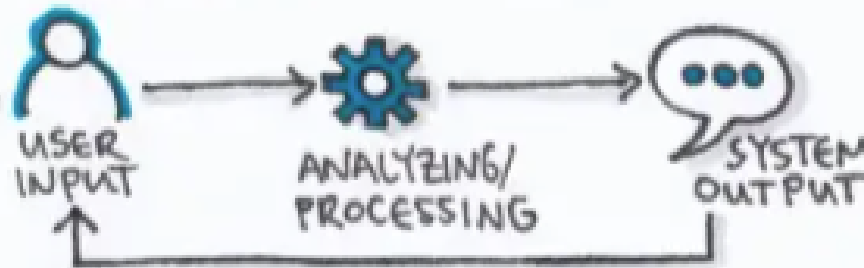
! SMALL THINGS CAN MAKE/BREAK THE EXPERIENCE

YOU CAN DEFINE A SYSTEM/BOT PERSONA

SET OF ATTRIBUTES
GOAL: MAINTAINING CONSISTENCY
+ IN MANY CASES: ADDING PERSONALITY
! THINK ABOUT WHETHER IT'S APPROPRIATE IN YOUR CASE OR NOT, SOMETIMES A CHARACTER/ PERSONALITY IS JUST A DISTRACTION.
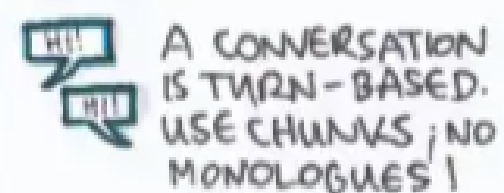
TAKE INTO ACCOUNT THE PRINCIPLES/ CHARACTERISTICS OF NATURAL, HUMAN-TO-HUMAN CONVERSATIONS:
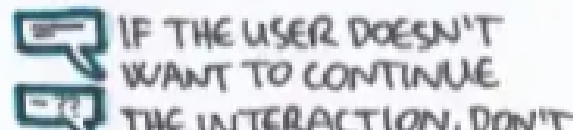
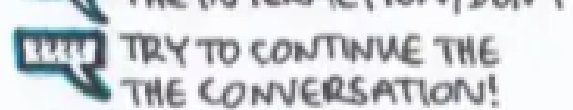→ STARTING POINT FOR DESIGNING CONVERSATIONAL UI
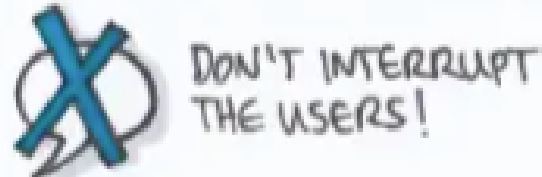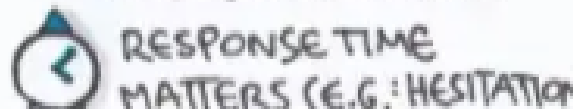
DON'T INTERRUPT THE USERS!

IF THE USER DOESN'T WANT TO CONTINUE THE INTERACTION, DON'T TRY TO CONTINUE THE THE CONVERSATION!

A CONVERSATION IS TURN-BASED. USE CHUNKS; NO MONOLOGUES!
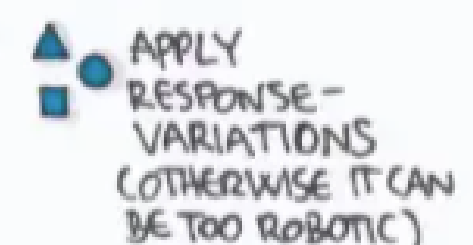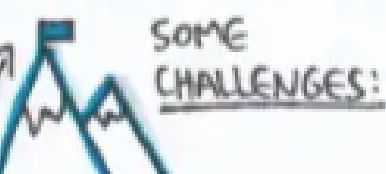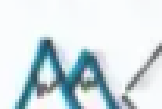
RESPONSE TIME MATTERS (E.G. HESITATION)
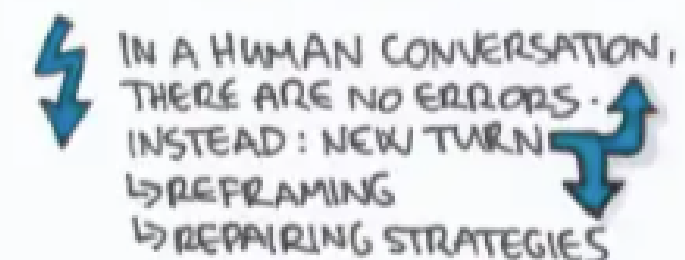
IN A HUMAN CONVERSATION, THERE ARE NO ERRORS. INSTEAD: NEW TURN
↳ REFRAMING
↳ REPAIRING STRATEGIES

APPLY RESPONSE- VARIATIONS (OTHERWISE IT CAN BE TOO ROBOTIC)

SOME CHALLENGES:

RULE-BASED BOT: ADDING ALL CASES

AI BOT: TECHNOLOGY IS FAR FROM MATURE

CONTEXTUAL AWARENESS & INTENT

EMOTIONALLY INTELLIGENT BOTS

SOME MORE ASPECTS OF DESIGNING A CONVERSATIONAL UI:

LANGUAGE: IDIOMS, SLANG, SYNONYMS, REGIONAL VARIATIONS

WORDS: CLARITY! USE PLAIN LANGUAGE INSTEAD OF JARGON. GENDER?

SIGNIFIERS: BOTS SHOULD PROACTIVELY SUGGEST WHAT USERS CAN DO.

FEEDBACK: ALWAYS PROVIDE FEEDBACK TO THE USER. → FEELING OF BEING IN CONTROL

DIFFERENTIATE: NEW VS. RETURNING/ EXPERIENCED USERS → MODELING RELATIONSHIPS OVER TIME - WHAT IS SAVED? (~REMEMBERING)

SHORTCUTS: IN MANY CASES, THE USER KNOWS IN ADVANCE WHERE SHE WANTS TO END UP IN THE CONVERSATION.

SAVED STATUS: ALLOW USERS TO CONTINUE THE TASK AFTER A PERIOD OF NOT USING THE BOT.

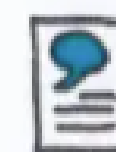SHOW PROGRESS: STEPS ALREADY TAKEN

BUT BEFORE THAT...

① IS USING CONVERSATIONAL UI A GOOD SOLUTION? IF YES!

② START WITH YOUR USERS! GOALS, MOTIVATIONS, NEEDS, CONTEXT (E.G. DEVICE TYPE) CREATE PERSONAS, USE EMPATHY MAPS, JOURNEY MAPS ETC.
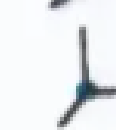
③ CREATE A STYLE GUIDE (E.G. TONE OF VOICE, OVERALL IMPRESSION YOU ARE GOING FOR.)

④ ASSEMBLE INITIAL, HIGH-LEVEL CONVERSATION FLOWS ONE STEP IS ONE DIALOGUE/ USER INTENT WORDING: LATER; IT SHOULD BE LIKE A MAP
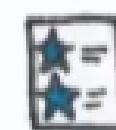
⑤ WRITE SAMPLE DIALOGS: START WITH THE SPOKEN FORM IN MIND (EVEN IF YOU DESIGN A CHATBOT)

⑥ FIRST WORK ON THE KEY USE CASES, THEN ADD DETOURS, FINALLY INCLUDE EDGE CASES. (3 LEVELS)

⑦ TEST & ITERATE! E.G. WIZARD OF OZ TEST: SOMEONE "BEHIND THE CURTAIN" PRETENDS TO BE THE SYSTEM (AS IF HE WAS THE BOT); THE USER THINKS THAT SHE INTERACTS WITH THE CHATBOT/VUI.

⑧ YOU CAN ALSO DEFINE A SET OF PRINCIPLES SOME EXAMPLES: • TRANSPARENCY, NOT PRETENDING TO BE A HUMAN

YOU SHOULD ADD COUNTEREXAMPLES

• ESCALATION POLICY: HUMAN FALLBACK

MY ROLE & GOALS

While at Allstate, I was the lead UX product partner with the Sales Chat Bot team and the IVR design team, collaborating directly with product and business owners, international development leads, data teams and research partners - as well as coaching junior conversational designers - to deliver improved conversational experiences that are genuinely responsive to both customer and business needs and expectations.

When I came onboard, I had three main objectives:

1. Improve the Sales bot accuracy and customer satisfaction scores significantly;
2. Identify opportunities to improve IVR customer transaction success rates and satisfaction scores
3. Establish scalable best practices across all conversational platforms

STARTING POINT
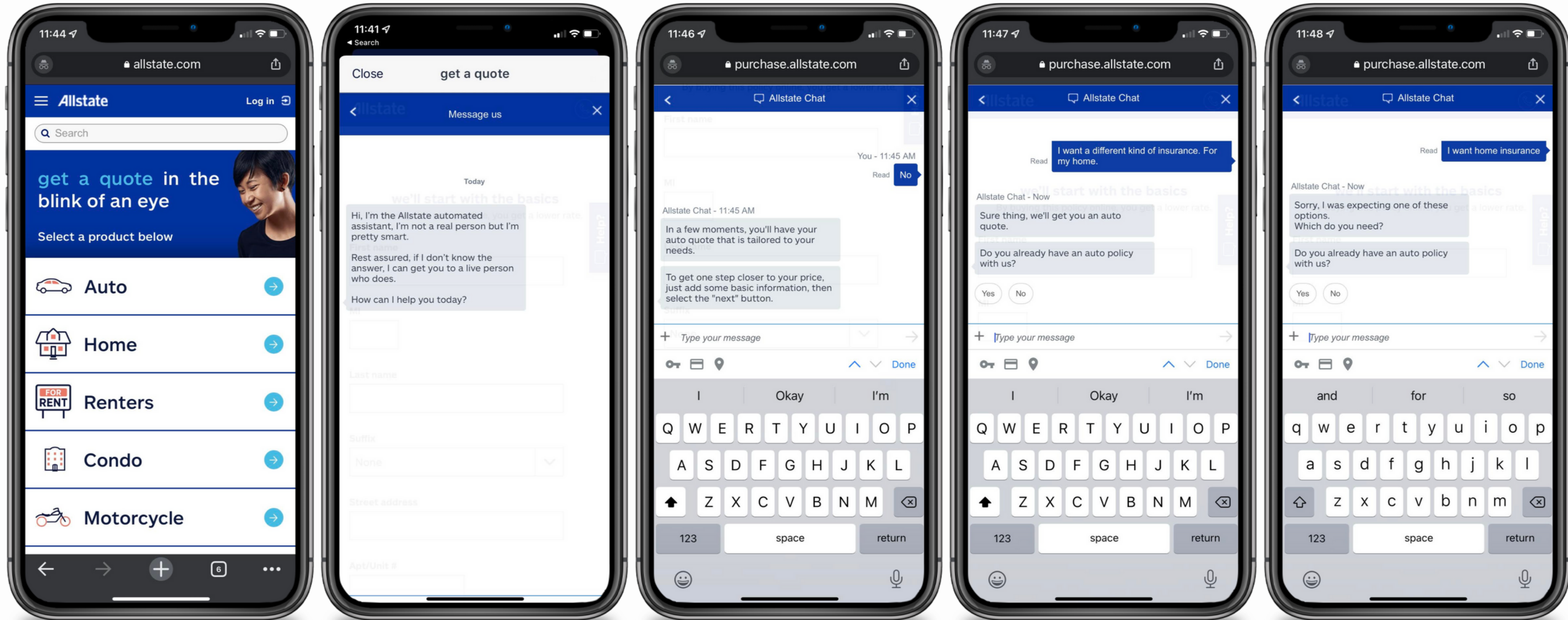
Blink is a strong word.

Wordy, and over promises.

Missed the negative response.

Routinely misread utterances.

What?

STARTING STRATEGY

When designing overall strategies for chat or VUI, my goal is always to design customer experiences that are natural and intuitive - and that are scalable across interconnected platforms, to help users wherever they are and wherever they land.

The connecting factor? All of these projects required building strong relationships.

That meant rebuilding trust among product partners.

After initial review, I determined the main opportunities for the Sales bot were:

- Current intent utterance & NLP tuning
- Design and implement scalable conversational content strategies (social, dissatisfaction, redirect, etc)
- Better/any alignment with supporting platform UI
- Utilize internal NLP capabilities to support better data analysis
- Identify API/data sharing blockers preventing better customer experience

STAYING ON THE SAME PAGE

It's critical for everyone on working teams to be working from a shared set of expectations. Often, documentation and other artifacts in Conversation design can be hard to find. This puts stakeholders with CxD/VUI familiarity at a disadvantage. And that can cause miscommunication.

So I start every project by establishing alignment via working design principles. Examples include:

Service Minded Service Design

Show, Don't Tell

Think outside the Bot

STRATEGY | IDEATION

Dissatisfaction Strategy | MVP Ideation

Voice design is a team sport, and clear agreements are key. Sharing iterative ideation, collaborating on MVP KPIs early and often with all invested stakeholders builds trust and keeps momentum flowing.

Social Responses Strategy | MVP Ideation

Keep recommendations clear, actionable and measurable

STRATEGY | DATA ANALYSIS
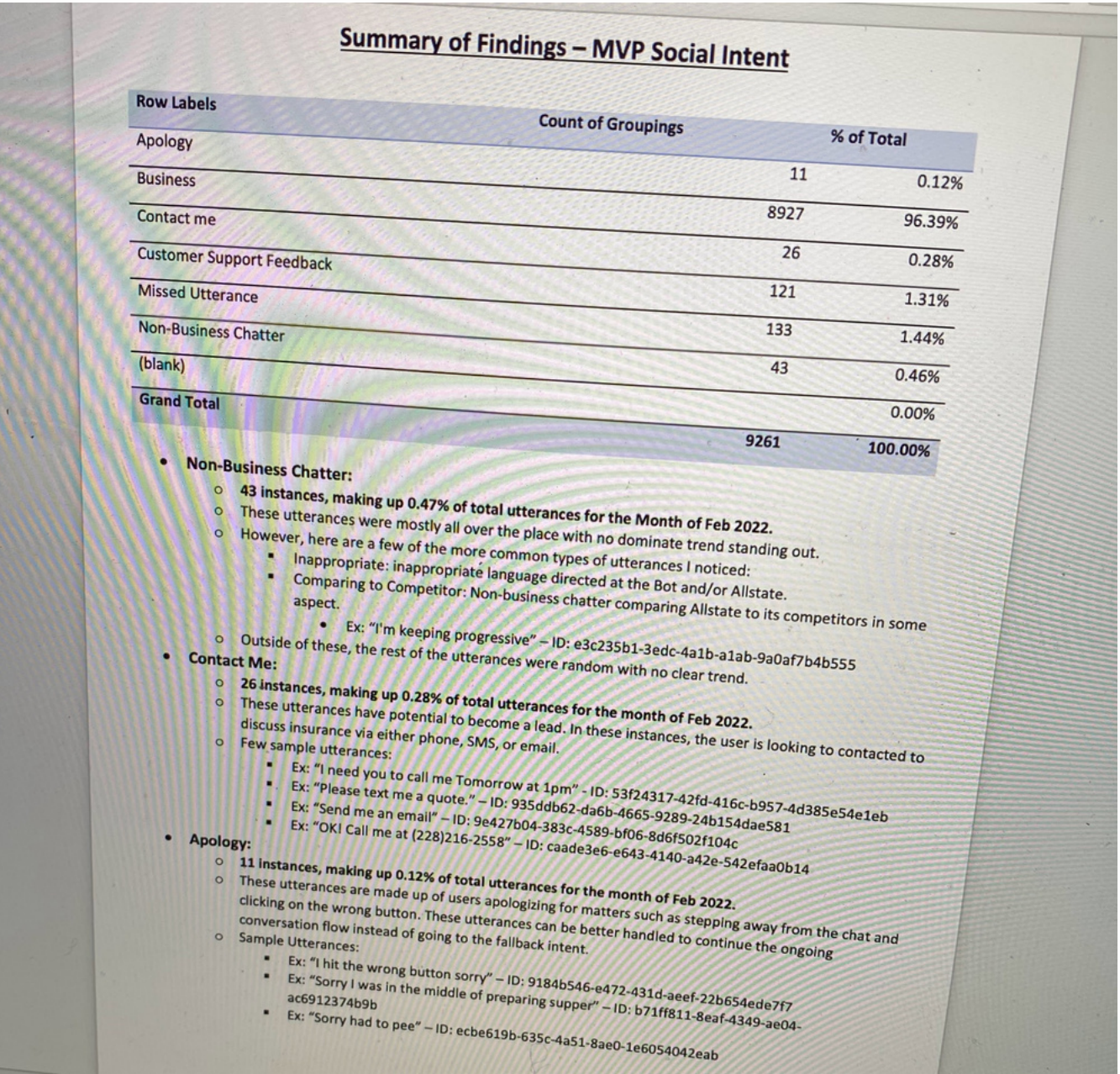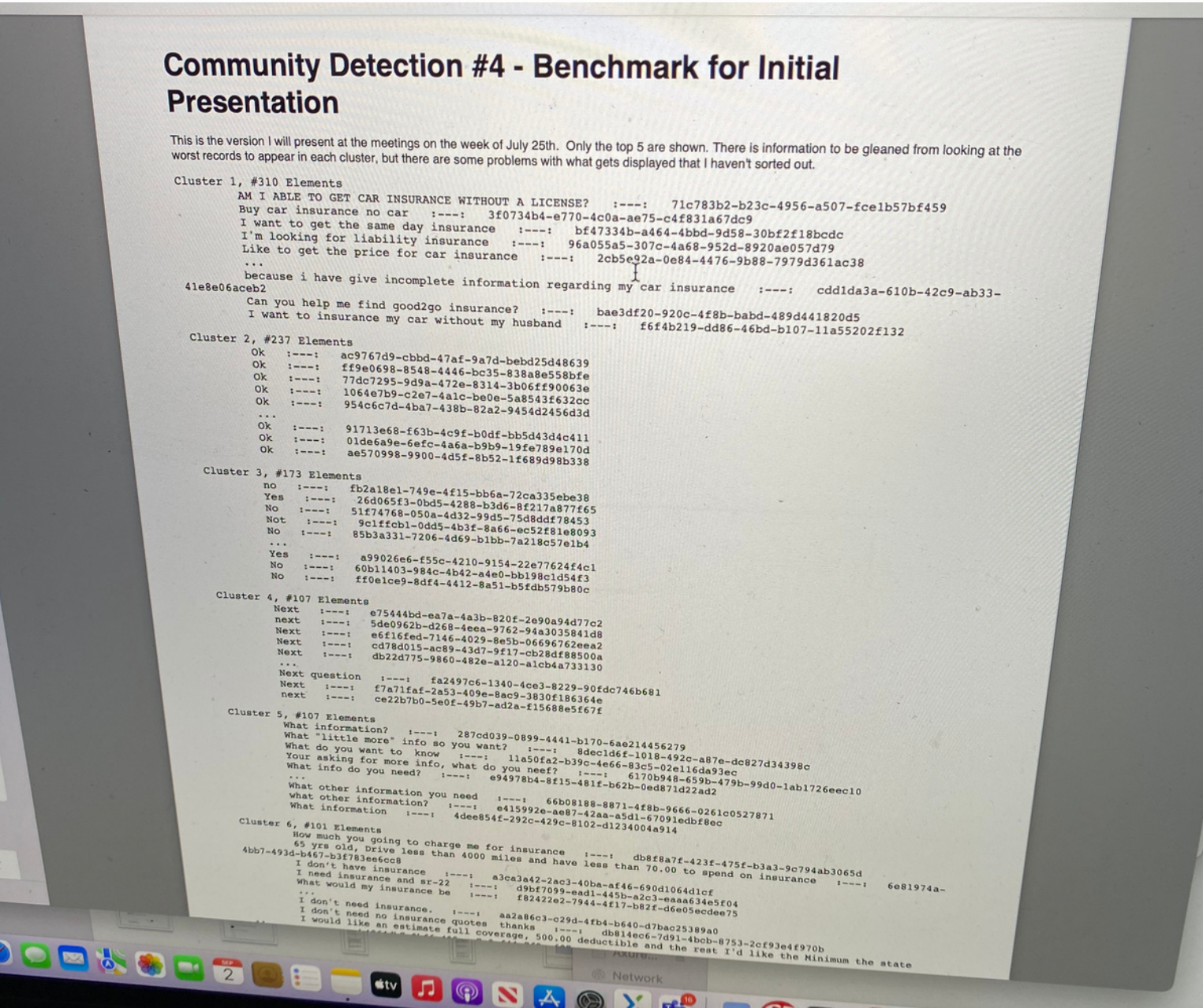
Social Response Strategy | Utterance Community Detection Algorithm and Supporting Data Analysis

Always verify your big moves. Here, unique utterance cluster detection algorithm and deep-dive utterance review designed to inform social and dissatisfaction bot content strategy implementation.

STAKEHOLDER COMMUNICATION
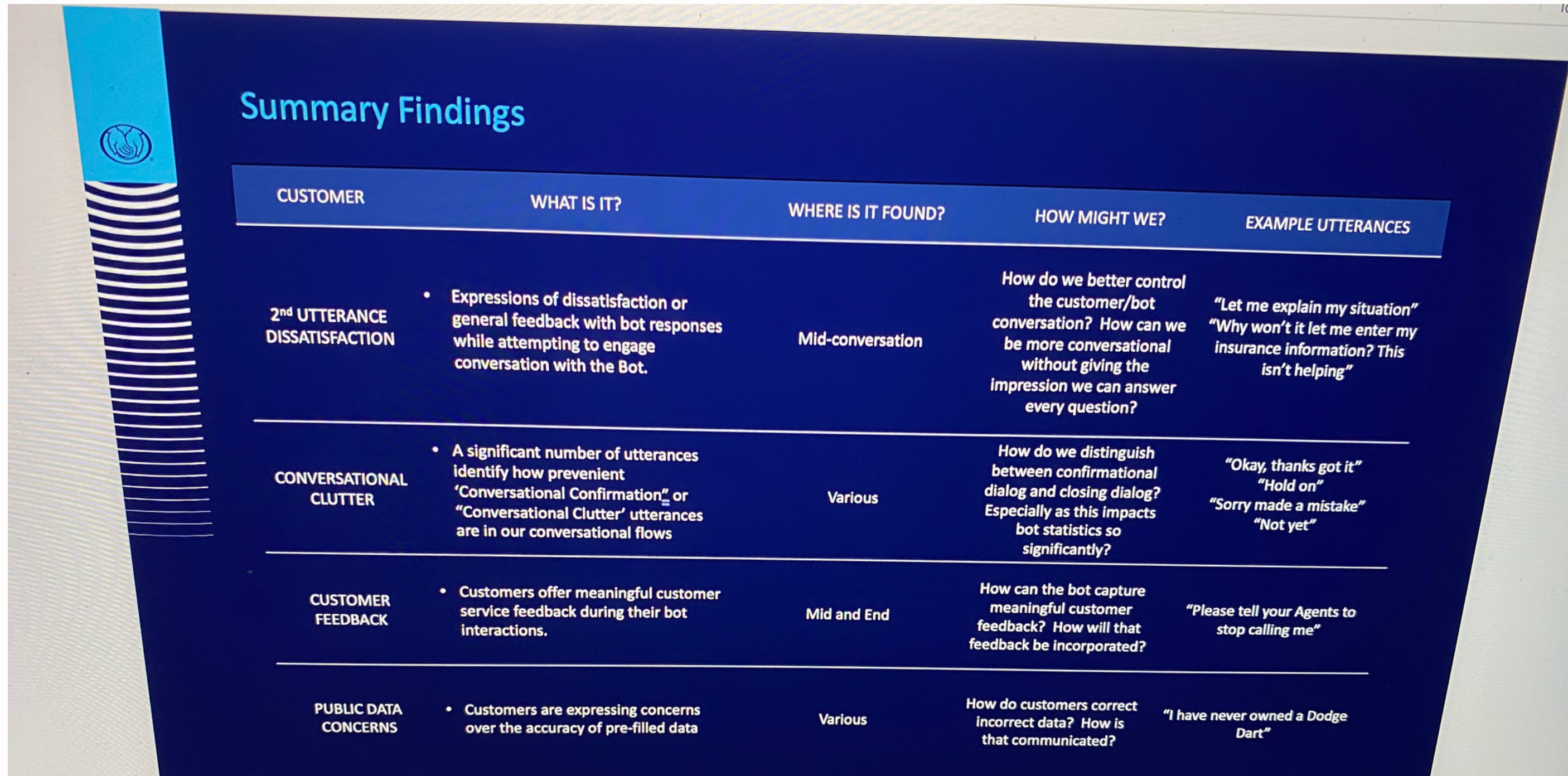
Data driven, business driven creative solutions
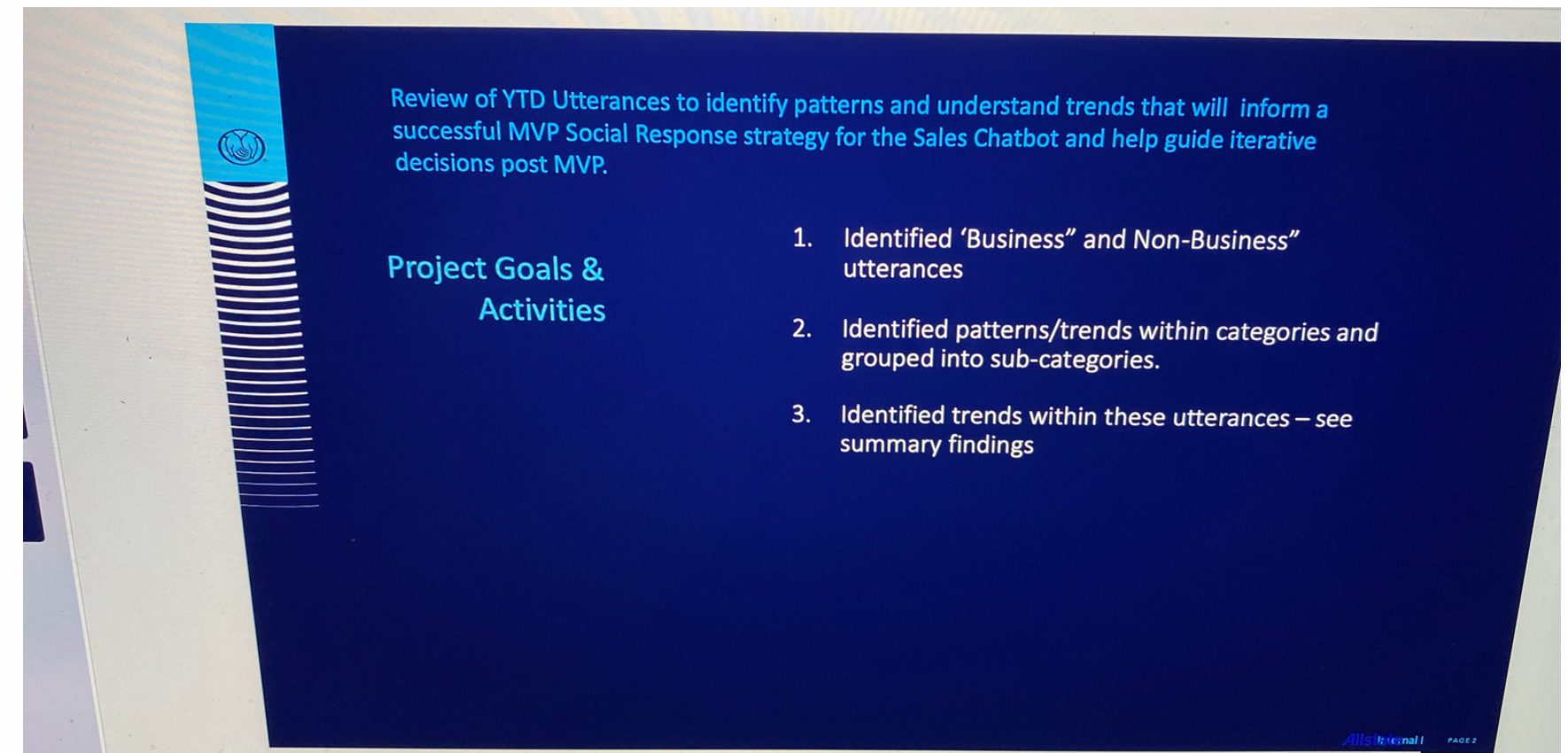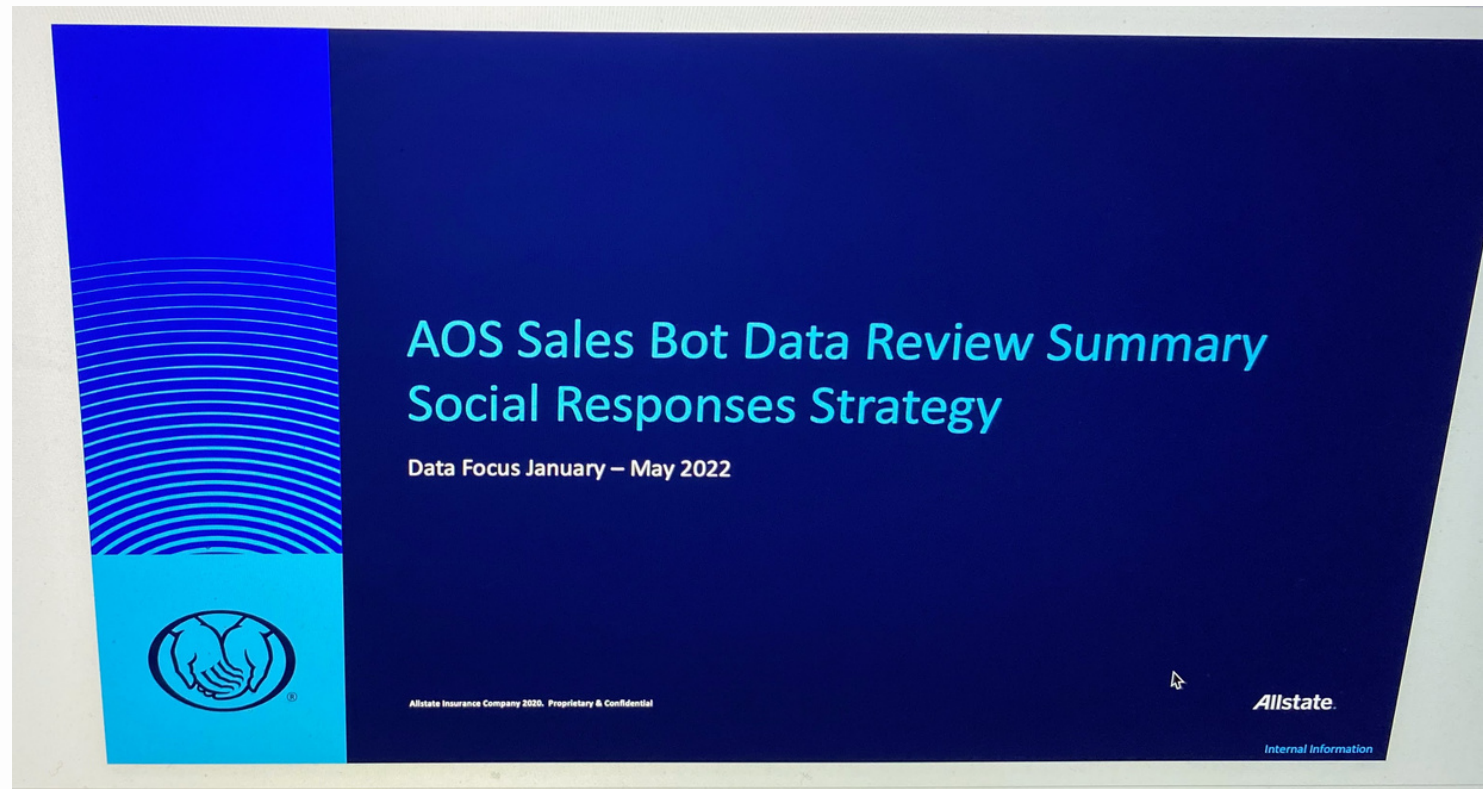
Over communicate - and use language that everyone can understand.
Beware of jargon blindness!

STAKEHOLDER COMMUNICATION

Data driven, business driven creative solutions

STAKEHOLDER COMMUNICATION

Data driven, business driven creative solutions

STAKEHOLDER COMMUNICATION

Data driven, business driven creative solutions

WORK WITH WHAT YOU'VE GOT

Even Axure.
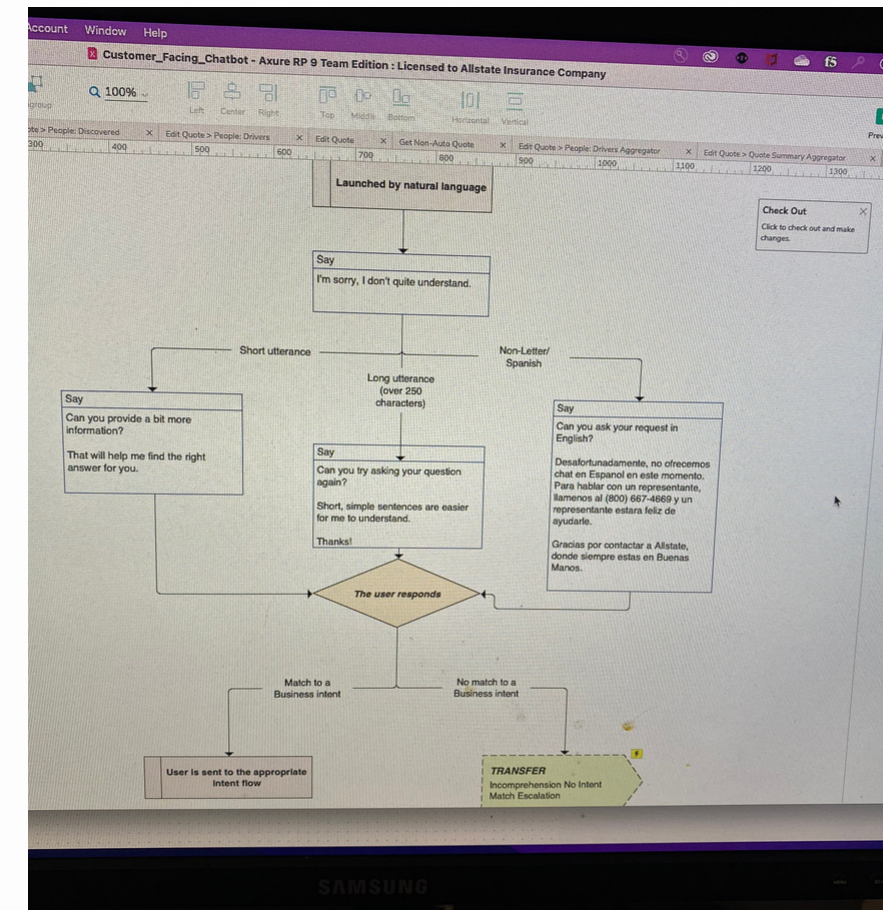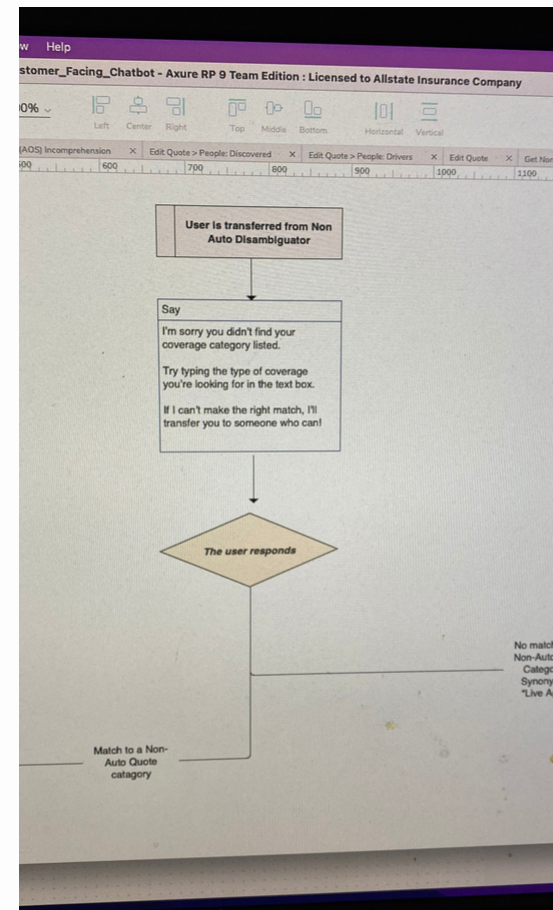
THINK OUTSIDE THE BOT

Sometimes the best way to tune a bot is better alignment with any associated UI's

Sometimes the biggest problem isn't bot content.

Summary

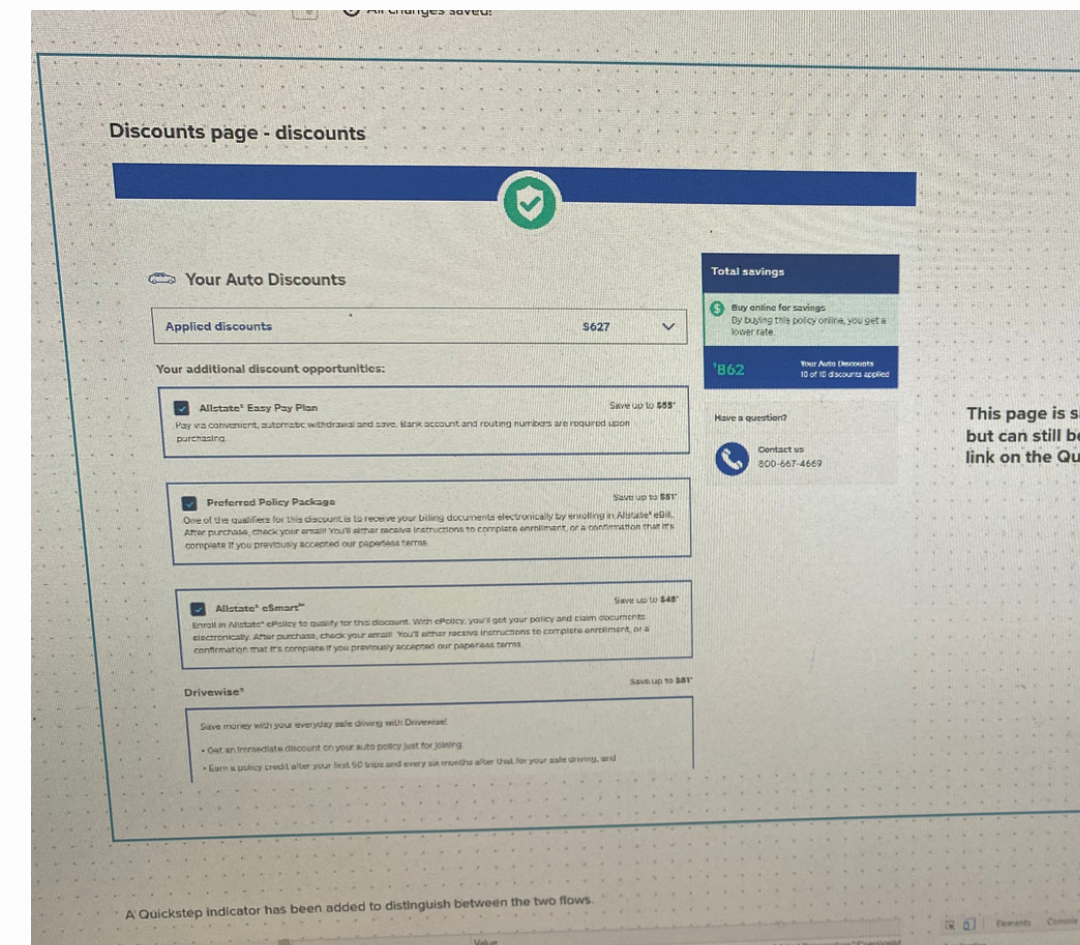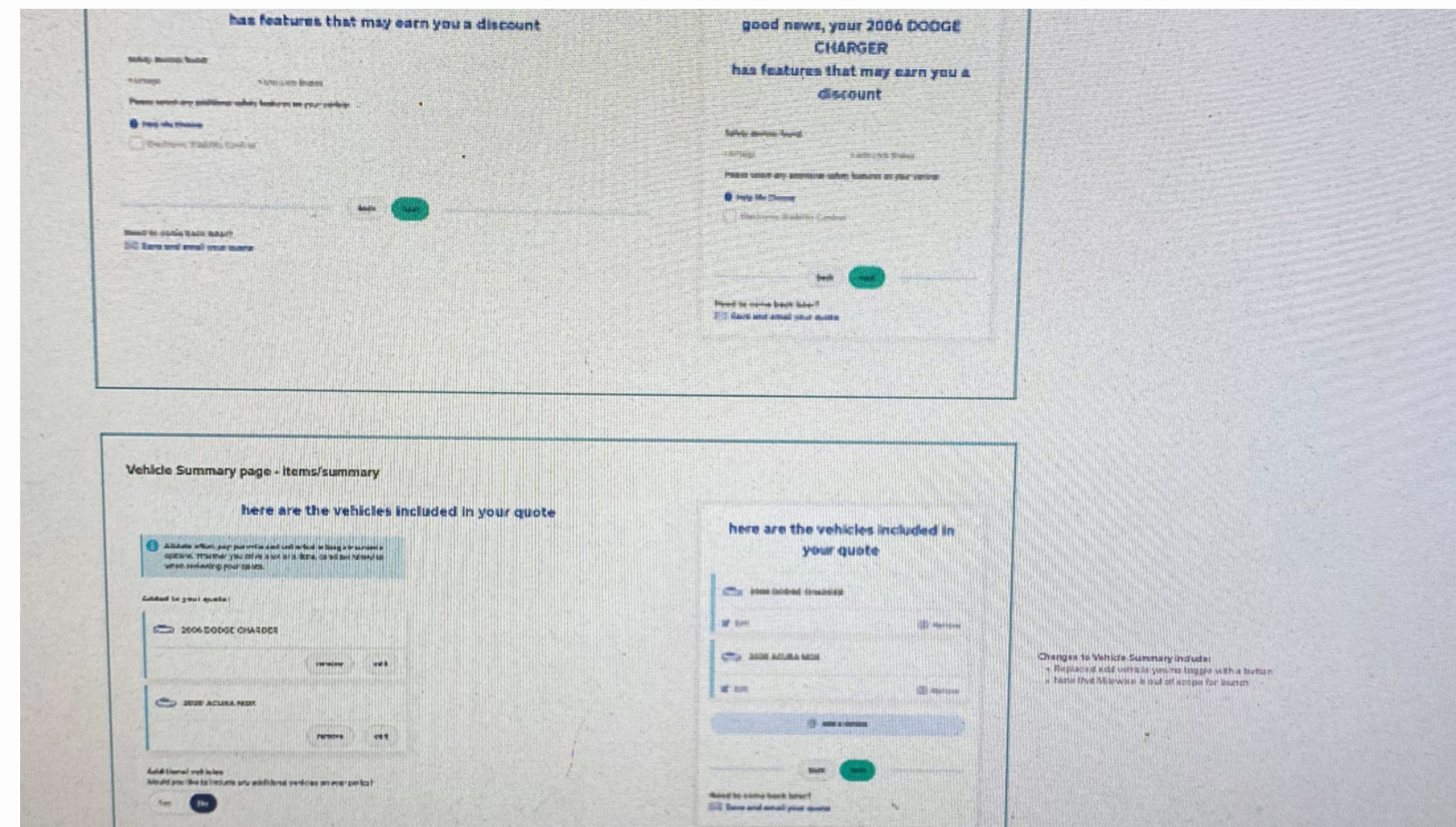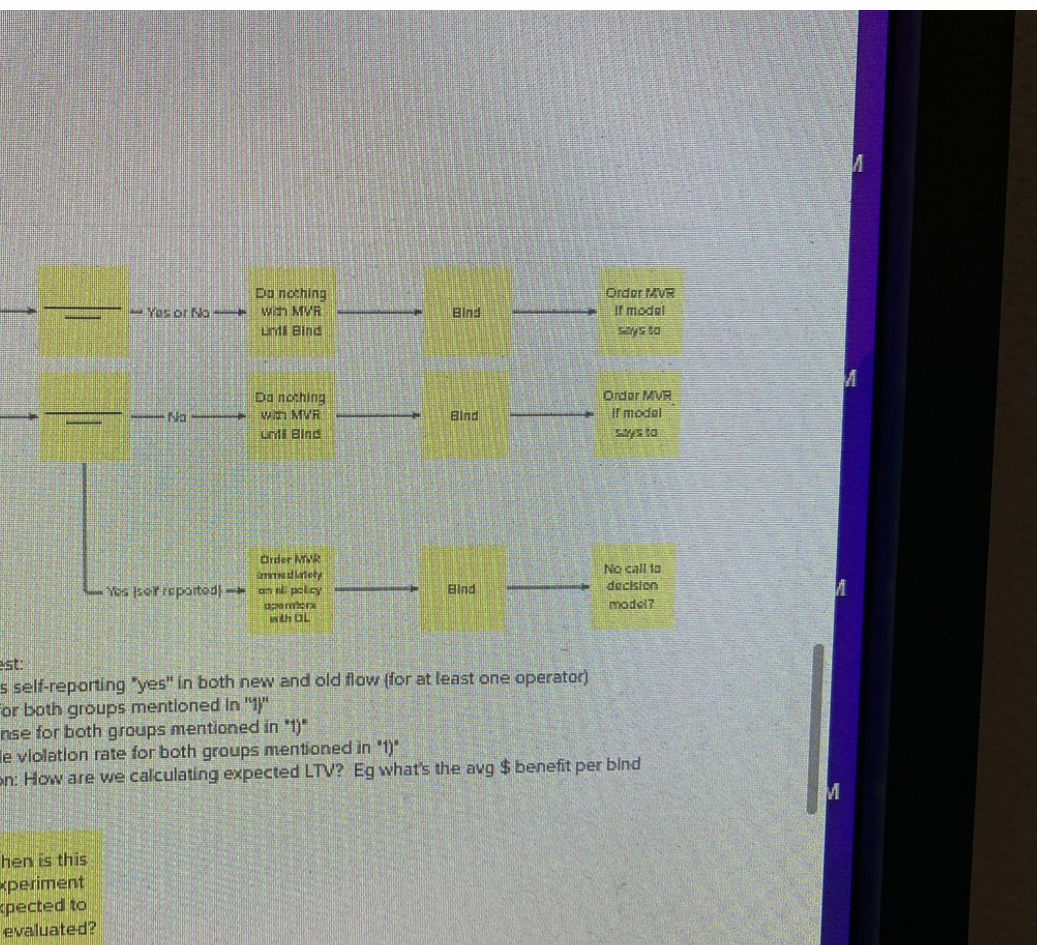In the end, we successfully implemented several new dialog content strategies and reconfigured the LEX Intent and NLP training for the whole bot, improving performance significantly - and increased customer perception of both the Bot and the Brand's 'listening' to them, significantly increasing containment rates.

There were many other wins too. But the greatest was re-establishing trust and collaboration among the working teams - creating true alliances across channels, establishing best practices so knowledge wouldn't lost with staff changes and mentoring junior members to be ready to step up and lead. That was truly the most satisfying part of the engagement.

IVR Addendum

In addition to the Bot work, I also coached the IVR designers through a content review of current customer flows; collaborated with them to establish a brand-aligned **Voice & Tone style guide** and content library; performed a series of **Speech Recognition** and **Voice Biometrics** testing; and started initial groundwork for integrating **NLP capability**.

Ran **weekly workshops** with design team to review works in progress and share out new functionality information and testing data. I also partnered with product owners and technology teams to **problem-solve API issue**s and to get ahead on upcoming functional enhancements so our team could look forward.