

## Exercise

# Building a bot persona

## Why personas are important

Your bot should be considered a member of your team - a virtual agent alongside your human ones. But does it really make a difference?

Matching the style of customers with a strong bot persona leads to better, more consistent customer experiences, which results in fewer drop-offs from the sessions, more end-end resolutions, improved CSAT, and repeat business. When you think of interactions you have with brands you have contacted, those which create a seamless, personalized, and human-centric experience are the ones you are more likely to develop an affinity to. Whereas, if you have an experience that is robotic, basic, or disjointed it causes a disconnect and leaves you feeling less than satisfied.

In order to create this consistent on-brand experience, defining [your virtual agent's character](#) is the best thing you can do!

A character is a named entity apart from your organization or brand name that represents some/ all of your brand's attributes or characteristics. Creating a character and giving it a name are not the same thing. For example, both Amazon and Google offer voice-activated talking speakers (Amazon Echo and Google Home) for home assistants. Amazon named theirs Alexa, while Google chose not to create a separate name. Ultimately, it is up to you if you should have a character name, but if you do, it should be easy to pronounce and memorable.

What makes or breaks a character is a personality. A bot personality is a consistent set of human characteristics embodied by your product, service, or organization. While a brand is the sum of all the associations in the mind of your customer, their personality is how the system is designed to sound and behave. If you don't define a personality it can then be hard to determine the tone of voice and writing style of your bot.

## Building a character

To build this, start with your values as a company and put them in human terms. The following is an exercise to help you.

1. If we were a person out there in the world serving our customer, our job would be to \_\_\_\_\_ (primary role your product plays).
2. Customers would describe us as the most \_\_\_\_\_ (adjective), \_\_\_\_\_ (adjective), and \_\_\_\_\_ (adjective) of any in the profession.
3. We never want to come off as \_\_\_\_\_ (negative adjective), \_\_\_\_\_ (negative adjective), or \_\_\_\_\_ (negative adjective).

Here is a filled-out example as a reference. Can you guess which organization this is?

4. If we were a person out there in the world serving our customers, our job would be **DJ/music librarian**.
5. Customers would describe us as the most **eclectic, smartest, and perceptive** of any in the profession.
6. We never want to come off as **snobby, stale, or narrow-minded**.

## Determining tone of voice

As you and your team design your replies, ask yourselves if your replies sound and behave in accordance with your chosen values and qualities - this comes down to the [tone of voice](#). You can check with your support team as to how they typically formulate their replies and how they would describe them so you remain consistent. Another recommendation we can offer is to consult the branding team and their associated assets to ensure it follows the brand strategy guidelines. An agent that works on your social media teams is also a great person to include in the conversation design part of the project - as they can be the most personable and brand-oriented.

Once you have a character decided, think about how they would speak and what words would you use to describe them. Below we have two examples, would you say one aligns more to your brand than another, or are there different traits you would focus on?

Based on your key customer demographics, which reply seems more appropriate?

Option A	Option B
<ul style="list-style-type: none"> <li>● Formal and helpful</li> <li>● Communicates in a calm way</li> <li>● Emojis are not used</li> </ul>	<ul style="list-style-type: none"> <li>● Casual and resourceful</li> <li>● Communicates in a friendly manner</li> <li>● Emojis are used strategically</li> </ul>
<ul style="list-style-type: none"> <li>● “Hello, how may I help?”</li> <li>● “Here is what I found: “</li> <li>● “Please try this webpage first”</li> <li>● “Let’s try and get your account access working.”</li> </ul>	<ul style="list-style-type: none"> <li>● “Hi there 😎! What can I do for you?”</li> <li>● “Check out what I found 🤖:”</li> <li>● “First things first: Have a go at this webpage”</li> <li>● “Access issues are so frustrating! Let’s go through some steps together first 🙌 “</li> </ul>

## Persona Examples

To help you build out your persona we have created two example characters - Bot Hawking and Botoncé who are two different personalities based on well-known figures. When it comes to representing the brand and communicating with customers they would have very different styles and would represent different types of companies. Bot Hawking might be associated with a university, museum, or publication business. Whereas Botoncé might represent a company in the music, fashion, or cosmetic-focused industry. Your company’s brand ambassadors can be a great source of inspiration and can also add another layer of association for those customers who have converted from following those brand ambassadors.

A resource we can suggest, and actually used to create these characters, is the [Crystal Knows personality quiz](#), which gives different personality classifications, from 16 personalities, Jung’s, Myers & Briggs, DISC, and Enneagram with key traits surfaced. This may also be a helpful resource for finding a personality type or attributes that fit your brand communication style.

## Bot Hawking



Description	Example Messages
Bot is someone that appreciates diving deep into complex problems to find solutions with a systematic approach.	Hello, how can I be of assistance?
<b>Personality</b>	From my investigation, I have found the following information...
Bot is very analytical, logic-focused, and ambitious. They can be described as an independent thinker focused on solving the world's problems.	This link may hold the answers we need to solve your inquiry, but if not we can explore other possibilities together.
<b>Tone of Voice</b>	Can you provide me with the following information in order for me to conduct my investigation?
Confident, straightforward, inquisitive, witty humor, and knowledgeable.	Thank you for your collaboration. Have a nice day!

## Botoncé



Description	Example Messages
Botoncé tends to be ambitious, adaptable, and enthusiastic. Botoncé is generally driven and loves to set and accomplish goals.	Hello! Thank you for giving us the opportunity to chat. How can I help you today?
<b>Personality</b>	Let me check that for you and see what I can do to sort this out.
Botoncé is a social butterfly and highly aware of others' needs. Botoncé tends to be empathetic and warm-hearted.	We appreciate your feedback, this gives us the opportunity to learn and grow - but I apologize we couldn't be perfect for you.
<b>Tone of Voice</b>	If you need me, I will always be here for you. It's been a pleasure chatting. Have a blessed day!
Confident, enthusiastic, supportive and friendly.	