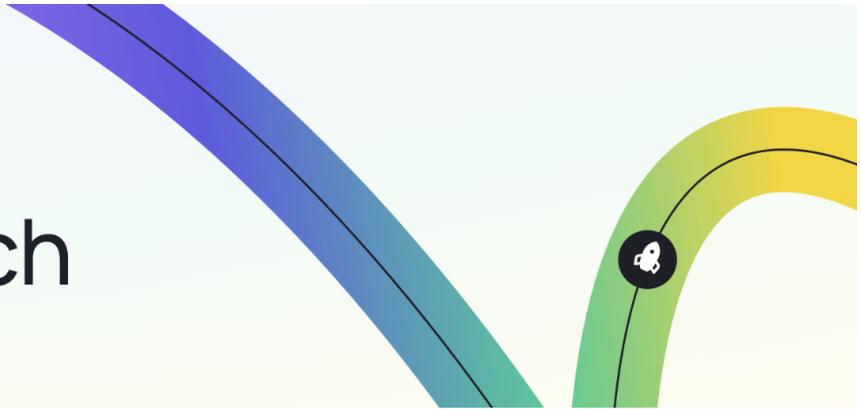


Helpful Handout

Prepare to Launch



Why should you test?

Your bot should be considered a member of your team - a virtual agent alongside your human ones. Same as when you have new humans on your team, you give them a buddy to learn from and work with to then assess when they are ready to work alone, this is the way you can validate the experience of the virtual agent before setting it live.

This ensures you have pressure tested the Intents you have trained to ensure the virtual agent if the expressions used by your testers were captured and triggered, are they handling them appropriately, does it match the tone of voice you determined, and what is the general experience.

How do you test - setting up a testing environment

In order to test your virtual agent, we recommend connecting to your CRM and embedding the widget onto a sandbox, staging, or testing environment of your website or help center. This will allow you to test any Actions or Triggers you have set up in their entirety. To ensure your CRM reporting is not impacted, create a group with a test email to have the tickets handled separately from the day-to-day. If you don't have a testing environment you can still test by connecting to your CRM but will need to be creative as to where you locate the widget or have it routed off of a rule based on employee email addresses.

If none of this is possible, we do have a test bot button within Ultimate, where you can test the conversation flows. You will just need to create an account in Ultimate for your testers.

Full instructions can be found here:

Determining your testers

Who should you get to test? A very important question. Ideally, you don't want the same people that built the flows, as they will be biased based on knowing how the flows are built, and may not be able to see issues such as typos or formatting if they created them. Then it comes down to finding value for them to help. Therefore we would recommend 2 types of stakeholders, process-focused and experience-focused groups. This ensures that you get specific feedback from those respective groups on two main factors that they are better positioned to offer. These people can come from wherever in the business, however, those who will have a vested interest on whether the bot succeeds are highlighted below.

Process-Focused	Experience-Focused
<ul style="list-style-type: none">• Operations Department• Quality & Training• New Support Agents	<ul style="list-style-type: none">• Social Media Department• Marketing Department• New Support Agents

We have put new support agents in both columns, as they have a unique attribute that can make this task especially good for them, which is a fresh set of eyes. They are not influenced by past events and are likely knee-deep in the documentation so can assess where there are discrepancies to ensure everything is up-to-date and correct. In addition to this, they get to learn your company's tone of voice and the way requests will be responded to in the first line of defense - which will accelerate their onboarding process.

Preparing your testers

It is important to brief your testers on the intents the bot understands and what exactly you are asking them to review. Especially if you ask them to focus on the experience and tone of voice, you may wish to share with them the persona you built earlier in the onboarding to ensure they match. Testing can be as robust and detailed as you like with a team as large or small as you like, but we do have some tried and tested rules we would recommend you ask your testers to follow.

Golden Rules

- **✗ Don't troll the bot.**
E.g. "How to take the best selfie with my trainers"
- **✓ DO** simplify your questions and ask one at a time
- **✓ DO** ask the same question in different ways
- **✓ DO** try to get through entire dialog flows and test their different stages and options (i.e. when the bot fails to recognize your issue right at the beginning, do record this, but then do another run trying to get past that point and deeper into the dialog flow).
- **✓ DO** take screenshots to accompany your recommendations and feedback.
- **✓ DO** take screenshots of any and all scenarios in which the bots fail to understand your query and/or simply deliver a bad user experience.

Feedback template and example

Collecting feedback is the most important part of the testing process. The more detailed the feedback the easier the bot builders' lives will be easier, first to make improvements but also they can quickly add more expressions based on how each of your testers would ask about that topic. This is all with the end goal of getting your virtual agent ready to be set live.

The feedback should be collected with screenshots, on whether the response was accurate, matched the persona tone, and if it met the expectations so areas for improvement can be identified.

Create a shared file with your testers and your builders so that they can track the progress of the test, see feedback from others to perhaps upvote and save duplications, and track whether a resolution has been implemented. To illustrate what this can look like and what to include, please review our example instructions and table below.

Testing Instructions					Builder Instructions	
<p>Thank you for participating in our testing of the ultimate virtual agent - your support will shape how we revolutionize the way our support organization works, how customers experience our brand and impact brand advocacy.</p> <p>During the testing please consider how the virtual agent is curating the experience, whether it aligns with the persona created and the voice of our brand, as well as if the resolution follows the processes and is delivered in a timely, and impactful manner.</p> <p>The inquiry scenarios we would like you to test are;</p> <ul style="list-style-type: none"> • Login issues • Order status • Update profile information • Ask to speak in a different language • Request to speak to a human agent <p>Please test them in a way you, as a consumer, would test them, by using varying degrees of clarity and how you typically would interact with support.</p> <p>During testing, note down your feedback, positive or constructive, in the table below. A member of the building team will then review any improvement suggestions and work to implement those.</p> <p>Thank you again for agreeing to support the launch of our new virtual agent.</p>					<p>To ensure the virtual agent is ready to launch, a group of testers has been assembled to review the flows to assess whether any improvements can be made before launch.</p> <p>Feedback will be collected in the sheet below. Please review this daily and assess whether the change suggested can and should be implemented, document when a change is made, and ask the tester to retry the flow to ensure the change achieves the goal of their suggestion.</p> <p>In addition to the end-user experience, validate whether the appropriate CRM actions and statuses were applied.</p> <p>To ensure there is no duplicative work, claim a task and use the status column to communicate with the team the progress of each report.</p>	
Name & Date	Which scenario was tested?	What happened?	What would you change and why?	Screenshot of conversation/ issue	Builders only: Change Implemented	Status
Timmy Tester 21.12.21	Account Issues	<p>Positive: The process was followed nicely and the guidance was written in a very clear manner.</p> <p>Possible Improvement: The chat reached a dead-end after resolving the account issues conversations</p>	I would add a question like is there anything else? A satisfaction survey or a nice closing message. Otherwise, the chat kind of dies and doesn't have a nice ending experience.	{screenshot here}	<p>Yes - Link to CSAT reply added</p> <p>23.12.21</p> <p>Bobby Builder</p>	Tested
Rita Reviewer 22.12.21	Update Profile Information	The guidance was written very clearly, however, maybe it was a bit long and could be condensed.	Add the did that help message to the main text, or add a delay as the second message bumped the text bubble up, meaning I needed to scroll up to see the beginning of the message		<p>Yes - The text was split into multiple steps, where the user then says they have completed the task and is ready for the next instruction.</p> <p>23.12.21</p> <p>Betty Builder</p>	Awaiting feedback from tester