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By <u>Chris Mueller</u>

In recent years, conversational interfaces have exploded in usage and what was once seen as an annoying gimmick is now viewed as a legitimate alternative to traditional processes. In fact, <u>a 2019 report by Drift</u> found that just 14% of users would prefer to fill out a form over using a chatbot. This growth is exciting for many reasons, but for me, it's because we UX designers have the chance to shape this medium while it's still fresh.

Like all emerging tech, conversational interface design best practices are still being developed, but here at Blink we've had the opportunity to design a few of our own and learned a lot along the way. Below are a few important design principles to keep in mind when crafting your own conversational UI.

Anticipate needs

Interfaces today are getting better and better at understanding context to anticipate user needs and reduce effort. This is a concept called <u>anticipatory design</u> and can go a long way in crafting an interface users will love.

For example, imagine you've received a notice from your internet provider that you're late on a payment. You open a chat window on their site and see an empty prompt asking what you want to do. Kind of underwhelming, right?

Now imagine a different provider's chat, which recognizes that you're late on a payment and asks if you'd like to pay now. Once you've paid, it suggests the next logical steps, like signing up for auto-pay, so you don't have to do this again.

Like a barista remembering your usual order, suggestions like this help to make a user feel both

understood and important because the system has recognized who they are remembered their behavior, and anticipated what they want to do.

Vlocity ⁻ Q Energy				ders and more				~ •	? 🌣 🗭 🕒
Vlocity Service Con	Acco	unts 🗸	Barnes – San Francisco 🚿	 Buy N' Large 	– Cleveland 🗸 🗙	:			
		0.000		5 05147101/51/0				Vlocity Assistant	
		OVERVIEW BIL	LING USAGE PROFIL	E RELATIONSHIP	S DETAILS			How can I he	lp?
Pat Barnes Residential Customer		Electricity Nat	ural Gas			Current cycle (Dec	1-Dec 31) >	Looks like Pat has been co electricity on weekends th	
123 Front St. San Francisco, CA 94040		40 kWh						Average electricity use	,
(235) 332-6426		30							
gat.a.barnes@gmail.com		20						Weekdays	17.4 kWh/da
👶 Called twice today		10		L				Weekends	26.8 kWh/da
8 Risky financial standing 0		0 12/1	12/5 12/10) 12/15	12/20	12/25	12/31	That's new for him and wi	
Hard of hearing				Temperature	Energy use			be calling to do the follow	-
				- remperature	LiferBy use			Investigate cl	hanges in usage
ustomer Story	•							Changes	service plan
Notice of missed payment Hello Pat, we're writing to inform you that we have not yet received	Nov 15	CYCLE	TEMPERATURE	ELECTRICITY	COST	NATURAL GAS	COST	Analyze usage	in Data Central
To: Pat Barnes From: Vlocity Billing Services		Nov 2018	H 61° / L 44°	164 kWh	\$35.12	41 therms	\$70.34		
Bill not paid by due date	Nov 1	Oct 2018	H 69° / L 46°	121 kWh	\$26.18	44 therms	\$75.65		
Amount: \$111.97 Due date: Oct 30, 2018		Sep 2018	H 77° / L 47°	98 kWh	\$21.12	46 therms	\$77.23		
Change of service inquiry Pat called to check if they could switch	Oct 20	Aug 2018	H 82° / L 48°	73 kWh	\$17.23	43 therms	\$73.65		
their current services Name: Lei Chan		Jul 2018	H 81° / L 45°	73 kWh	\$17.23	42 therms	\$72.12		
Payment received Amount: \$112.62	Sep 25	Jun 2018	H 80° / L 55°	75 kWh	\$18.23	44 therms	\$74.76		
Method: VISA ending in 1234		May 2018	H 76° / L 48°	78 kWh	\$18.66	39 therms	\$69.13		
Payment received Amount: \$73.56	Aug 31	Apr 2018	H 76° / L 32°	74 kWh	\$17.23	39 therms	\$69.13	Ask anything	-

In our work with Vlocity, we designed a smart assistant to aid customer service agents by analyzing a customer's account to suggest actions they may be calling about.

Reduce typing

It's natural to think that a 'conversational' interface would use typing as its primary interaction. After all, it's how a lot of our conversations occur every day. However in this case, typing should be the user's last resort as typos, missing keywords, and colloquialisms can all lead to the dreaded phrase, "Sorry, I didn't quite get that..."

Instead, a conversational interface should always provide a user with easily selectable options in addition to the ability to type a custom response. Even simple options like "Yes" and "No" make an experience feel dramatically simpler.

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Assistant		X Assista	nt	X Ass	istant
Hi Pat, how can I help	o?	Right away. Would you like to do it over t	the phone or	Looks like your closest mile away:	store is about a
a can type in your question, or s h one of these popular topics:	start	in-person at a store?	In-person	Slate Bry Bite Stor	Cafe
Pay your bill				Bowling Clab	arrison 3
Check your usage		Sounds good. Looks like your closest store i	is about a	2055 Folsom St	1.2 mi
Upgrade your device		mile away:		Does this location wor	k for you?
Schedule an appointme Schedule an aj		Total Bar United Bar 2055 Folsom St	1.2 mi	OK, great. Let's get yo These are the earliest a	
ht away.				this store. Which works	
puld you like to do it over the ph person at a store?	ione or	Does this location work for y	our		
				Tuesday, Aug 14 2018	Wednesday, Au
	_			12PM 1PM 1	2PM 12PM 1PI
Over the phone In	n-person	Yep	I'll pick another	3PM 4PM	5PM 3PM 4P
			8		

Examples from another Vlocity project. We always give the user options to choose from so they don't have to type their responses.

Combine questions

Conversational UI usually needs to gather information from a user before completing a task. Often, this ends up turning something like a simple contact form into a lengthy back-and-forth, where the user provides one piece of information at a time.

This is a perfect scenario where you should break from the illusion of a natural conversation. If several questions can be easily grouped together, it's best to present them in a miniature form within the conversation.

	no, l'm not a cu	stomer yet
9	A few more details will help get you to the right person:	
	1. Email	(3 of 3)
	david@acme.io	~
	2. Number of Employees	
	500+	~
	3. Industry	
	Technology	~

Intercom uses inline forms to speed up information gathering. This interaction would take much longer if it was a standard back-and-forth exchange.

Personify your brand

A conversational interface can distill a user's entire experience with your brand into a few quick messages, so it's important the conversation leave a good impression. In order to create a memorable, personal experience, your interface needs to have its own personality.

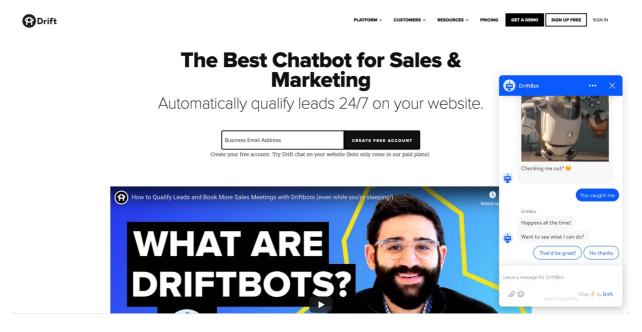
Now, I'll be the last person to tell you that <u>codifying a human personality</u> is easy, but you can at least get the ball rolling with a few simple questions:

- What are the needs of your target audience?
- Who do your users want to talk to? An expert? Someone like them?
- What is the purpose of the interface? Quick conversions? Long dialogs?

• What personalities (e.g. actors, friends, etc.) can I use as inspiration?

Regardless of personality, it's important to refer to your users by name and inject some emotion into each conversation. Few things are worse than talking to a computer that communicates like a brick wall.

That said, while it's important that the interface appear human and relatable, it's more important that it not masquerade as human. People are very good at recognizing a bot and users will resent you for thinking they are too dumb to notice.



Drift's example chatbot does a great job of personifying its friendly, energetic brand by using playful language and images.

Plan for failure

With their lack of signifiers and traditional interactors, conversational interfaces offer spectacular new ways for our designs to fail. Users may change the subject in the middle of a conversation, the system may misinterpret their responses, or the user may simply ask an irrelevant question.

While you may not be able to anticipate every error, there are a few techniques to help with common cases:

- Allow users to easily change the subject and pick up where they left off later on.
- When a task becomes complex, consider handing off the conversation to a human or launching a dedicated experience to handle that task.
- When the system doesn't fully understand what the user says, offer some best guesses while asking for clarification.
- Find fun ways to respond to the inevitable <u>silly questions</u>. Just prioritize accordingly delightful surprises are nice, but well-functioning products are nicer.

	person? 💛		101		
			VVI	iat does non	-technical mea
	UX Bear				
0	Alright! Than	k you for yo	our feedback 👍		
	Well, describin	ng jargon to	non-experts is 1	not always e	asy.
			th analogies! Tha	at's what the	Sideways
	Thus, it helps Dictionary do		-	at's what the	Sideways
			-	at's what the	Sideways
	Dictionary do	es! Give it a	shot! 🔽		
	Dictionary do	es! Give it a	a shot! 🔽	 a) b) c) c	

Here, http://uxchat.me/ isn't able to handle a follow-up question, but does a good job of continuing the conversation anyways.

As with all emerging tech, there's still a lot to learn about how to design a good conversational interface. Hopefully, these tips can help you create something that users will love, and you'll be proud of.

Do you have any tips or great examples of your own conversational interface design? We'd love to hear from you on Twitter at <u>@blinkux</u>.

Contact us today