Your Digital CX Dream Team

In most companies, the digital customer experience (CX) is powered by Chatbots and Human Agents. Chatbots are used to manage the easy-to-answer queries, while Human Agents via live chat manage the rest.

Frustratingly, for both company and customer, the range of conversations that Chatbots can automate remain stubbornly low.

As a result, high volumes of conversations conducted via digital channels continue to be powered by costly human brains.

So how can companies automate more sales, service, and support conversations without relying on a Human Agent to be in the loop? And how can Human Agents add more value, given their high cost per conversation?

Not All Conversations Are Equal

Conversations vary based on dialogue length, structure, and purpose.

Some conversations are short and to the point. A simple question and answer are all that is needed. Others take longer because more ground needs to be covered before an outcome can be reached.

Some conversations simply go with the flow. They shape to the last comment or question, with little structure forced on them. Others are very structured. You need to follow specific rules and processes while adjusting to context.

Rapport building and relationship enrichment are the focus of certain conversations. It's more about the feelings generated than the outcomes achieved. Then there are other conversations that are almost exclusively outcome driven. Feelings don't really factor in.

Some conversations are about advice, others about assistance. Advisory conversations take longer, and require you to fully understand the situation, need or problem before a solution can be offered.

Those that look to simply assist tend to be shorter, with the focus on speed - finding the right answer or performing the right action so you can be on your way. To effectively cater to all these distinct types of conversations requires varying levels of knowledge and skill.

And while Chatbots and Human Agents can be forced to manage most conversations, it does not mean they should. Ideally, they should specialise in the conversations they are best designed to manage, with the rest managed by other specialists.

This paper looks to clarify the conversation types that Chatbots and Humans Agents are ideally suited for.

We highlight a specific category of conversations that neither Chatbots nor Human Agents are particularly good at handling at scale.

And we identify a third member of the CX team that is designed to automate these specific conversations across digital channels.

By combining all three into a CX digital dream team, we believe companies can have better conversations at a lower cost

The Conversations That Human Agents Are Best Suited For

Human agents have traditionally been trained to manage a wide range of conversation types. We train their brains using our documented product, policy, system, and procedural manuals. These hold the logic that companies need applied when having rule-bound sales, support and service-related conversations with customers, suppliers, and staff.

And while most Human Agents, given enough time, can master these varied conversation types, their short tenure, different learning styles, the complexity of rules, the varied contexts they face and the rate of information change they must keep up with, usually works against them.

As a result, many struggle to conduct the full range of required conversations in a consistent and compliant way. To reduce their risk and stress, Human Agents often prefer to work within specialist teams managing a narrower range of conversation types.

This increases call and workforce management complexities. It also affects the engagement experience as customers are passed from agent to agent until they find one capable of having the required conversation.

While some Human Agents struggle to learn and retain complex rules and content, many show a natural ability in handling high impact relationship-centered conversations. The conversations that talk to emotions and feelings, not business rules and processes. Where they can leverage their natural sense of humour, compassion, empathy, and care, along with their understanding of language and cultural nuance.

These conversations, typically needed when closing a sale or resolving a complaint, are a natural sweet spot for many Human Agents. Unfortunately, given the high volume of rule-bound, operational conversations they must manage, very few Human Agents get the chance to specialize in these high-value conversations.

CLEVVA

The Conversations That Chatbots Are Best Suited to Have

Most Chatbots are designed to have short, question-answer type conversations. Their skill is understanding the question, or intent, based on how you write or say it.

Once the ask is understood, Chatbots look to answer the question based on content they can access within a knowledge base or website. They are in their element when asked to perform like smart librarians, finding the most probable answer to a specific request or question from a huge source of online documents, web pages and system data.

This is very helpful when you have a specific question you need answered, like "What are the features of the iPhone 13?" or "Does your medical aid cover out-of-hospital expenses?".

With the emergence of generative AI capabilities, Chatbots can now give you an answer that has been generated from a wide range of sources. Where earlier-version Chatbots acted like Google search, offering you a snippet from a web page or document, or a list of links to possible answers, those that have generative AI capabilities can now offer you a single consolidated answer.

Either way, the conversation you have with these Chatbots is usually short and restricted to a question and answer or instruction and action engagement.

This is ideal when you know what you need – you just want the Chatbot to find the answer or perform a specific action. It includes answering Frequently Asked Questions; retrieving specific information e.g., "Give me my 2023 tax certificate"; or triggering a requested action e.g., "Top up my data by 1GB" or "Book my car in for a service and arrange a lift back for me no later than 9.00am."

In general, Chatbots are best suited for unstructured conversations. Their brain is designed to learn and predict. It is why they are mostly used as digital assistants helping customers, suppliers or staff get answers to specific questions or to action specific requests.

When it comes to the more structured conversations needed to resolve, contextually rich and rule-bound queries, issues or disputes, some companies try script the engagement flow for them using decision tree logic. For those who have tried, the limitations of this becomes clear quickly, and the majority these conversations end up being managed by a live chat agent.

CLEVVA

When Conversational Volumes Stretch Chatbot and Human Agent Limits

For most companies starting out with digital self-service, the Chatbot/ Human Agent combination is all that is needed.

Their Chatbot can manage most of the simple information-based conversations and even perform some basic action requests. For the more complex informational, operational, and relational conversations that the Chatbot can't handle, a small team of live chat agents can be trained to handle these.

This approach may work well initially but becomes less effective once conversational volumes increase. This is when the inherent limitations of Chatbots and Human Agents get exposed, and the customer engagement experience gets damaged.

Introducing Virtual Agents, Specialists in Rule-Bound Conversations

Virtual Agents, powered by Conversational Process Automation technology, offer an effective way to automate more of the longer, structured conversations that Chatbots struggle with, and that take up the capacity of costly, highly trained Human Agents.

Virtual Agents are the equivalent of a sales, support, or service expert. They are designed to have the conversations needed to resolve known requests, queries, issues, and disputes, in context and in line with relevant business rules.

These operational conversations include outbound lead qualification and need-driven sales conversations; renewal, upgrade, and collection-related conversations; and the conversations needed to resolve most support and service-related queries and disputes.

The brain of a Virtual Agent is not built to self-learn or predict a conversational flow or pattern. It is built to replicate prescribed conversational processes at the level of a human expert – all in a consistent, compliant, and hyper-personalised way. Importantly, Virtual Agents do not rely on decision-tree logic to guide their conversations. They apply a more data-centered approach that allows them to adjust to context yet stay true to specific rules.

To have these expert-level conversations, a Virtual Agent needs to work seamlessly within both problem and solution domains. This allows them to help a person assess their specific situation, analyse their needs and/or diagnose the root cause of their problem before guiding them to the right solutions or outcomes, and then triggering the required actions.

CLEVVA

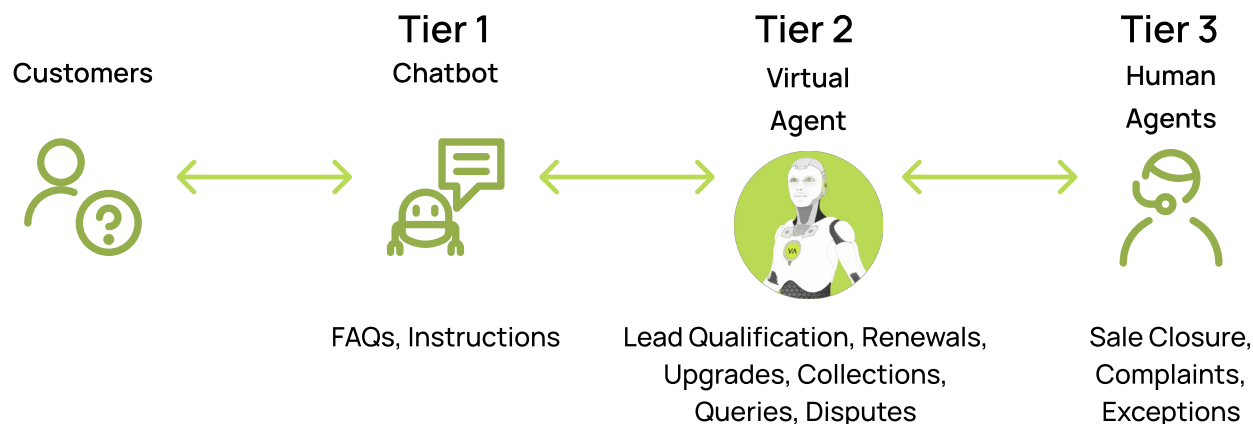|	Tier 1	Tier 2	Tier 3
Customers	Chatbot	Virtual Agent	Human Agents
	FAQs, Instructions	Lead Qualification, Renewals, Upgrades, Collections, Queries, Disputes	Sale Closure, Complaints, Exceptions

Figure 1. The typical positions within the digital CX team.

Virtual Agents can dynamically adjust to each person's context, while applying the correct business rules.

They can also provide detailed evidence of every conversation they have – data that is useful not only for regulatory reporting but also for deep analytics and targeted machine learning.

By managing high volumes of these operational conversations, Virtual Agents allow Chatbots to focus on the information-centred ones - providing answers to customer questions, quickly and accurately.

And they free up Human Agents to focus their energy on the relationship-centred conversations – the ones that build customer loyalty and close sales.

	Chatbot	Virtual Agent	Human Agent
Type	Informational	Operational	Relational
Purpose	To Assist	To Advise	To Assure
Outcome	Deflect	Deflect, Contain	Engage
Focus	Speed	Resolution	Loyalty/Trust
Length	Short	Medium	Long
Flexibility	Unstructured	Structured	Unstructured
Examples	FAQs, requests for information, clear instructions for action	Lead qualification, need analysis, renewals, upgrades, collections, queries, disputes	Sale closure, complaints

Figure 2. The conversation types each role is most suited for.

CLEVVA

	Chatbot	Virtual Agent	Human Agent
Ave. Cost Per Conversation	Low	Medium	High
Consistency	**Low** Its self-learning nature means that every conversation may be different.	**High** Built to ensure the consistent application of rules across channels, given any known context.	**Varied** Depends on each individual's personality and ability to learn and apply large sets of knowledge, data and rules
Compliance	**Low** The lack of consistency and the 'black box' logic model makes it very difficult to ensure and prove compliance	**High** Built to not only replicate your conversational formula in a trusted way, but to have the data to prove that they did	**Varied** As with consistency, compliance depends on each individual's personality and learning capability
Assurance	**Low** The self-learning nature makes it difficult to ensure the right data always gets collected, based on different contexts and system requirements	**High** Designed to follow prescribed conversational rules in context, and to gather required data in the right format and structure for systems to process	**Varied** Based on each individual's ability to consistently apply the right rules and capture the right data, based on correctly recalled logic
Insights	**Limited** The 'black box' makes it difficult to gain meaningful insights, to know why a specific answer was given, or what the conversational journey really looked like	**Detailed** Tracks every aspect of every conversation. The rich, structured data it gathers offers deep insights into conversational journeys	**Varies** Depends on each individual's ability and willingness to capture all the relevant data points of each conversation
Accuracy	**Varied** If rules change frequently, may struggle to keep up given its self-learning nature and decision tree logic (hard to maintain at scale)	**High** Their structured, data-centric logic makes it easy to maintain when rules and/or third party data changes	**Varied** Every time rules change, each individual is required to update their own brain through re-training. This is a time consuming and costly process.
Self-Learning	**Yes** Designed to constantly learn and adjust from past experiences and new data. This can be a challenge when done in a rule-bound context.	**No** Rather than self-learn, Virtual Agents provide business with deep insights that inform approved changes to logic.	**Yes** Humans are by nature self-learning organisms. They are constantly adapting their thinking and behaviour based on new patterns.

Figure 3. A comparison of strengths and weaknesses.

CLEVVA

In Summary

For companies looking to automate large volumes of conversations via digital channels, including a Virtual Agent into your digital CX team is essential.

It allows your Chatbot to continue its role as the first port of call, looking to supply an answer to a clear request for information or a call to action. The Chatbot's focus can be on speed - to give your customers, suppliers, or staff members the information or action they are looking for, as quickly as possible.

Then for the requests, queries, issues, or disputes that can't be solved quickly, and where further work needs to be done to clarify the context, gather outstanding information and firm up decisions, the Virtual Agent can take over. The Virtual Agent's focus is to increase the resolution rates for these known, process-bound engagements, and to try preventing any having to be fielded by a Human Agent.

This allows your Human Agents to focus on the lower volume, higher impact relational conversations that influence sale success and customer trust and loyalty. The ones that often take more time but add the most long-term value.

By having a specialist manage each conversation type, customers can be assured of an optimal engagement experience. And because more conversations get automated without relying on Human Agents, the average cost per conversation can be reduced significantly.

Without a Virtual Agent, Chatbots and Human Agents will continue to be asked to play out of position. This can hold when volumes are low. However, as they rise, their limitations will negatively affect the customer experience. Fortunately, your digital CX dream team is only one player away.

About CLEVVA

CLEVVA, founded in 2011, specialises in building, deploying, and managing Virtual Agents. These Virtual Agents engage directly with customers, suppliers and staff via multiple digital self-service channels.

They automate the conversations needed for effective lead qualification, renewals and upgrades, collections, query and dispute resolution, and information gathering.

Virtual Agents improve digital sales, service and support at a significantly reduced cost while freeing up human agents to focus on higher value, lower volume engagements.

For more information on CLEVVA Virtual Agents and how they can transform your digital CX experience, visit www.clevva.com

CLEVVA