



THE ENTERPRISE CHATBOT GUIDEBOOK

Contents

CHAPTER 1 | WHAT IS A CHATBOT ANYWAY?

CHAPTER 2 | A BRIEF HISTORY OF CHATBOTS

CHAPTER 3 | CHATBOTS VS. CONVERSATIONAL AI - WHAT'S THE DIFFERENCE?

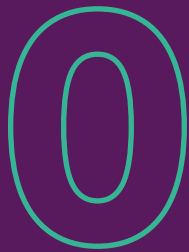
CHAPTER 4 | CONVERSATIONAL AI - HOW IT WORKS

CHAPTER 5 | CHATBOT FEATURES AND BENEFITS

CHAPTER 6 | HOW AI CHATBOTS DRIVE BUSINESS VALUE

CHAPTER 7 | USE CASES AND CASE STUDIES

CHAPTER 8 | CHATBOT BEST PRACTICES FOR ENTERPRISE



INTRODUCTION

Welcome to the enterprise chatbot guidebook! In these pages, we'll explore chatbots, conversational AI and their related technologies. We'll show you how and why conversational AI is crucial to the digitization of customer service for large-scale enterprises, and share use cases and best practices for getting started with a chatbot project.

Whether you're curious about automation or are preparing to deploy your 8th chatbot (go, you!), you'll find everything you need to walk away with the knowledge to help your business thrive in today's world of digital-first customer service, sales and support.

1

WHAT IS A CHATBOT ANYWAY?

Let's start with the basics. A chatbot is a computer program designed to enable interaction between humans and technology. Once limited to simple text-based communications, today's chatbots have evolved to handle other input methods, including voice and gestures.

Originally deployed as basic self-service tools, answering common questions and offering consumers 24/7 access to businesses, chatbots are now a Swiss Army Knife of automation, capable of enhancing operational efficiency in every area in addition to providing customer service and support.

But not all chatbots are created equal. The difference between a good chatbot and a bad one depends on its underlying technology. While artificial intelligence has made it so that even the most basic bot with off-the-shelf technology can automate simple tasks, larger enterprises require more sophisticated chatbots capable of automating customer interactions at scale.

That's where conversation enters the picture — and where things start to get interesting. Before we get into that, here's how chatbots evolved to where they are now.

WHAT IS A CHATBOT ANYWAY?

What's in a name?

Chatbots go by many names: virtual assistants, AI chatbots, intelligent assistants, conversational agents...the list goes on. Ultimately, these are all interchangeable and vary by the vendor or solution.

At boost.ai, we prefer the name “virtual agent” — because chatbots powered by conversational AI do much more than just chat. Just like any good live agent, they act on your behalf to deliver consistent service, provide accurate answers to your customers, and create personalized experiences.



2

A BRIEF HISTORY OF CHATBOTS

The first chatbot — or proto-chatbot — ELIZA, was developed in 1964 at MIT by computer scientist Joseph Weizenbaum. Using a simple pattern-matching algorithm and substitution methodology, ELIZA simulated communication between humans and machines, making it an early example of a natural language processing (NLP) program.

While ELIZA gave users the impression that it could understand them, the program was unable to contextualize events, making its functionality fairly basic. Even so, ELIZA laid the groundwork for the future of chatbots.

These are the major milestones in chatbot history:

1950s–1980s: Early Foundations

1950



The Turing Test

Even before ELIZA was a glimmer in its creators' eye, Alan Turing posed the question of whether a machine could think in his seminal paper 'Computing Machinery and Intelligence'.

1964–1966



ELIZA

The world's first rule-based NLP chatbot was proof positive that humans were eager to communicate with machines. ELIZA could carry on (relatively) convincing conversations by mimicking human responses.

1972



PARRY

Described as "ELIZA with an attitude," this Stanford-developed chatbot simulated a person with paranoid schizophrenia, successfully fooling many experienced psychiatrists.

1986



Backpropagation Algorithm

Geoffrey Hinton popularized backpropagation, a key algorithm that enabled the training of deep neural networks, laying the groundwork for modern AI.

1988–1997



Jabberwacky

An early attempt at creating an AI through human interaction, Jabberwacky was designed to simulate natural conversation with a sense of humor.

1990s: Statistical NLP

1990



HMMs

The widespread adoption of Hidden Markov Models (HMMs) revolutionized speech recognition and machine translation, providing a probabilistic framework for sequential data.

1994



WordNet

The launch of WordNet, a comprehensive lexical database, became a cornerstone resource for NLP and computational linguistics.

1995



A.L.I.C.E

Inspired by ELIZA, the Artificial Linguistic Internet Computer Entity (A.L.I.C.E.) was an NLP chatbot that served as the inspiration for the 2013 film Her.

1997



LSTM

Long Short-Term Memory (LSTM) introduced a breakthrough in sequence modeling, enabling NLP models to better capture long-range dependencies in text.

2000s: Shift to Neural Approaches

2001



SmarterChild

Available on AOL Instant Messenger and MSN Messenger, SmarterChild was the first chatbot to achieve mainstream adoption by millions of users in the early 2000s.

2003



BLEU Score

The BiLingual Evaluation Understudy (BLEU) score emerged as a standard metric for assessing the quality of machine-translated text by comparing it to human translations.

2010s: Neural Networks and Transformers

2010



Siri

Launched initially as a standalone iPhone app, Siri was integrated into iOS with the launch of the iPhone 4S in 2011. This ushered in a new era of voice-enabled virtual assistants, including Google Assistant and Amazon's Alexa.

2013



Word2Vec

Google's Word2Vec revolutionized vector-based word embeddings, introducing the skip-game and Continuous Bag of Words (CBOW) models for capturing semantic relationships.

2010s: Neural Networks and Transformers Con'td

2014



Seq2Seq and GANs

Seq2Seq models transformed machine learning translation by enabling end-to-end sequence learning, while generative adversarial networks (GANs) opened new frontiers in generative AI by pitting neural networks against each other.

2016



Messenger Bots

Chatbot adoption exploded when Facebook announced it would begin introducing bots to its popular messaging platform. In 2023, Facebook parent company Meta released the latest iteration of its AI-powered chatbot, Meta AI.

2017



Transformer Architecture

The Transformer model, introduced in “Attention Is All You Need,” redefined NLP and generative AI by emphasizing attention mechanisms over sequential processing.

2018



GPT

OpenAI’s Generative Pre-trained Transformer (GPT) marked a turning point in generative AI with its ability to generate fluent, contextually relevant text across a wide range of tasks.

2019



BERT

Google’s bidirectional encoder representations from transformers (BERT) introduced bi-directional pre-training, significantly improving performance for diverse NLP tasks by enabling deeper contextual understanding.

2020s: Generative AI Breakthroughs

2020



GPT-3

OpenAI's GPT-3 set a new benchmark for text generation with its massive-scale pre-training, demonstrating unparalleled versatility across conversational and creative applications.



2022



ChatGPT

OpenAI launched ChatGPT, making its generative AI accessible to the public and sparking widespread interest in conversational AI and multimodal applications.

2023



GPT-4

OpenAI's GPT-4 pushed the boundaries of multimodal AI with its advanced reasoning and adaptability, heralding a new era of generative models capable of seamless text and image integration.

3

CHATBOTS VS. CONVERSATIONAL AI - WHAT'S THE DIFFERENCE?

Basic chatbots can answer simple FAQs — and not much else. For large enterprises with complex needs, that's not enough.

Conversational AI transforms chatbots into powerful tools capable of understanding human language and processing transactions, in addition to providing essential information. This synthetic brainpower enables chatbots to understand, process and respond to human language and respond to dynamic, varied inquiries.

In short, conversational AI makes chatbots smarter, faster and more capable — but not all chatbots are powered by conversational AI.

Scalability is everything.

For large organizations, such as banks or government agencies, handling thousands of unique customer service requests each day is a huge challenge, and basic chatbots fall short. Conversational AI enables chatbots to scale language understanding and capacity without any loss of accuracy — no matter how high the demand.

CHATBOTS VS. CONVERSATIONAL AI - WHAT'S THE DIFFERENCE?

Using sophisticated deep learning and natural language understanding (NLU) algorithms, conversational AI makes it possible for chatbots to do more than translate content into simple chat responses.

With conversational AI, enterprises can automate even the most complex interactions — from blocking credit cards and filing insurance claims to upgrading data packages and generating invoices — all with ease and accuracy.

	Basic chatbots	Chatbots with conversational AI
Online 24/7	✓	✓
Natural language understanding	Keyword-based tech	✓
Dynamic, context-based navigation	Button-focused navigation	✓
Multi-level intent hierarchy	If/Then statements	✓
Unlimited scalability	Limited improvement capacity	✓
Broad scope	Narrow scope	✓
3rd-party integration support	Limited understanding model	✓
Self-improving over time	✗	✓
Consistently high-resolution rates	✗	✓
Omni-channel	✗	✓
Entity extraction	✗	✓
User authentication	✗	✓
Voice and conversational IVR	✗	✓
Multi-lingual	✗	✓
Privacy & security compliant	✗	✓

CHATBOTS VS. CONVERSATIONAL AI - WHAT'S THE DIFFERENCE?

In the 2019 report, '[Competitive Landscape: Virtual-Assistant Platforms Worldwide](#)', Gartner identified the three core technologies that power most chatbots. Understanding the difference between these technologies is key to choosing the right option for your organization.

Rule-based programming

The common architecture for most basic chatbots, rule-based programming relies on keywords and other language markers to trigger predetermined responses.

- + Easy to implement
- Does not scale

Computational Linguistics

A flexible approach for dealing with multiple languages, computational linguistics tackles customer requests at various linguistic levels.

- + Easily adapts to new languages
- High level of variation requires regular maintenance

Machine Learning (conversational AI)

The gold standard for advanced chatbots, machine learning processes large data sets to classify intents and deliver accurate, human-like responses.

- + Highly accurate and scalable
- Deployment can be resource-intensive

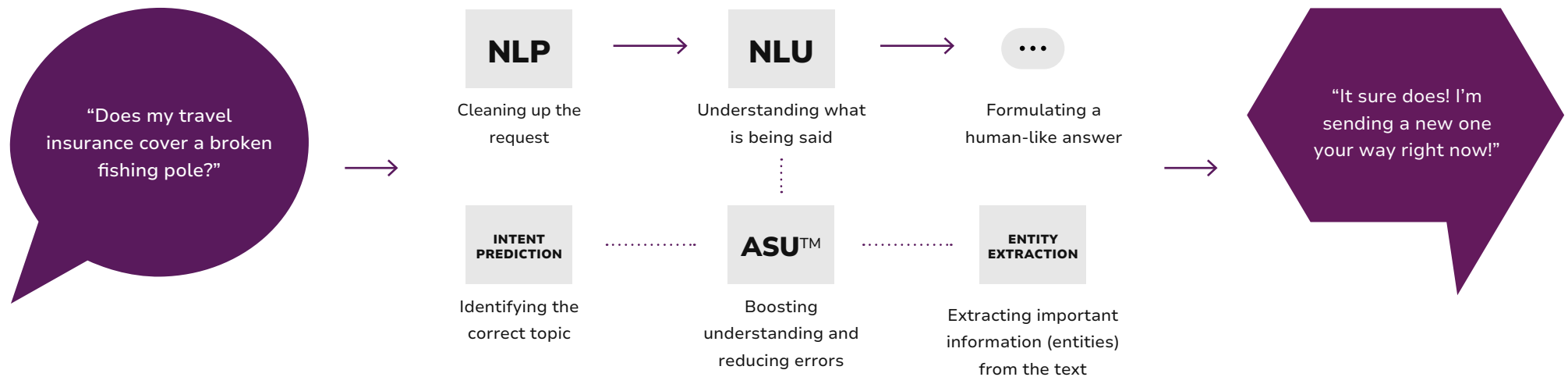


4

CONVERSATIONAL AI - HOW IT WORKS

How does conversational work? At first glance, it seems simple: a customer asks a question or enters a prompt, and the chatbot answers. But, behind the scenes, there are multiple technologies working together to ensure each interaction is seamless. Let's take a closer look.

CONVERSATIONAL AI - HOW IT WORKS



Natural language processing (NLP) is the first step. It cleans up the request — fixing spelling, interpreting grammar and breaking it down into simple parts — so that it's easy for the chatbot to understand.

Once NLP has laid the groundwork, natural language understanding (NLU) takes over. NLU, which is a subfield of NLP, consists of various deep learning and machine learning models. NLU identifies the intent behind the request and extracts key details such as context, account preferences, sentiment and so on.

These insights enable the chatbot to provide precise responses and trigger additional actions.

Think of it this way: NLP processes the words; NLU makes sense of them. Together, they're the brains behind smarter, faster, more human interactions.

An "intent" refers to the goal or topic a customer has in mind when typing in a request.

CONVERSATIONAL AI - HOW IT WORKS

Once it understands the request, it's time for the chatbot to formulate a response. Conversational AI combines customer intent and contextual information with a structured hierarchy of conversational flows. This enables the chatbot to deliver an accurate, personalized response in a conversational manner, regardless whether it's answering a simple question or carrying out a complex conversation on the customer's behalf.

And it doesn't stop there. Conversational AI gets smarter with every interaction. Self-learning AI continuously refines its responses based on conversation data, while human AI Trainers adjust the model, making it more efficient and effective over time.

Proprietary power-ups!

At boost.ai, our proprietary Automatic Semantic Understanding (ASU) algorithm takes language understanding to the next level. Part of our NLU stack, ASU increases our virtual agents' ability to parse complex sentences, reducing false positives by up to 90%.



CONVERSATIONAL AI - HOW IT WORKS

Do more with conversational AI

Conversational AI unlocks limitless opportunities for smarter, faster, more engaging customer interactions.

Self-learning AI

Build smarter chatbots that get better every day. Conversational AI's self-learning capabilities can scan websites (or other chatbots) to create viable models in hours or analyze conversation data to help AI Trainers optimize in real time.

Voice and conversational IVR

Go beyond text. Powerful language understanding can transform chatbots into voice-driven customer service experts, using text-to-speech and speech-to-text integrations to provide seamless, hands-free service.

Virtual Agent Network

Break down silos by connecting multiple chatbots within a single network. NLU detects intent and transfers users to the correct chatbot instantly, all within the same window, creating a smooth customer experience.

AI-assisted human chat

Empower your team with instant access to a wealth of information. By connecting chatbots to existing knowledge base systems, conversational AI can make real-time recommendations to front-line staff, enhancing their productivity without putting customers on hold.

Integrations

Make your chatbot a team player. From front-end tools such as Zendesk, Facebook Messenger and Slack to back-end solutions such as robotic process automation (RPA) and optical character recognition (OCR), conversational AI integrates with the applications you already know and love.



5

CHATBOT FEATURES AND BENEFITS

Now that you know what chatbots are and how they work, let's talk about what they can do for your business..

Choosing the right conversational AI platform starts with understanding the key features and benefits they can deliver. Here are the enterprise-grade features to look for when evaluating options:

High accuracy & resolution rates

A chatbot can't help if it doesn't understand. To meet the needs of every customer and build trust with every interaction, conversational AI must be built on robust NLU algorithms. A chatbot must also be able to:

- Interact with customers in a conversational manner
- Understand and act on customer intent, regardless of how complex the request is
- Identify multiple intents in the same request and provide customers with actionable responses for each
- Understand context to keep interactions from veering off-track
- Ask follow-up questions to clarify information and gather actionable data

CHATBOT FEATURES AND BENEFITS

When done right, conversational AI chatbots can automate up to 90% of customer interactions. Without these critical capabilities, you risk frustrating your customers — and losing their trust.

Scalable intent hierarchy

Basic chatbots can typically handle 100–200 topics at most. While that's fine for a florist or food service delivery, it's nowhere near enough for large organizations with complex product and service offerings.

Enterprises demand more. A robust conversational AI platform can scale effortlessly, enabling chatbots to manage thousands of intents, not just hundreds.

Conversational AI organizes intents in a hierarchical structure, making it easier to scale. By grouping topics by subject matter — such as insurance types or banking products — the AI can quickly locate the correct intent, delivering faster, more accurate responses. Compare this to flat, rule-based systems that struggle to keep track of intents.

Broad scope vs. narrow scope

Trying to solve a narrow set of problems with a chatbot may seem like a quick fix but it won't lead to lasting value. To achieve a sustainable ROI, enterprises need to drive long-term strategic growth, rather than settle for short-term wins.

Deploying broad-scope AI chatbots empowers organizations with high volumes of daily customer service traffic to effectively scale and automate at consistently high resolution rates. This is what transforms processes over time to be more effective, accurate and efficient..





CHATBOT FEATURES AND BENEFITS

Total cost of ownership

As conversational AI gets smarter, it's natural for enterprises to want more control without having to rely on data scientists or developers. Low-code and no-code platforms put automation directly into the hands of customer service reps, empowering them to create dynamic customer interactions.

With full ownership, your team can leverage their expertise to drive better outcomes. The result? Greater buy-in across the organization and better experiences for your customers.

Pre-built, vertical-specific content

Building a chatbot from scratch can be time-consuming. That's why best-in-class conversational AI platforms come with ready-made, industry-specific content. Need a banking chatbot? Get one preloaded with knowledge about credit card, mortgage rates and more and then tailor it to your brand.

When combined with self-learning AI, pre-built content can reduce implementation timelines from months to days.

Conversation analytics

Understanding your customers and their needs is key to chatbot optimization. Analytics tools enable you to mine conversation data using

features such as advanced search, tagging and quality rating, clean-up reports and API support to enhance chatbot performance and customer experience.

Seamless human hand-off

Even the smartest chatbot should know when to call for backup. With NLU, a chatbot can detect when a request is outside its scope. It will then automatically loop in a human agent to assist, providing full context — including chat transcripts and account details — to maintain a consistent customer experience.

By combining conversational AI efficiency with live agent support, you can increase customer satisfaction and loyalty without missing a beat.

$$\begin{array}{c} \text{Value per} \\ \text{interaction} \\ \times \\ \text{Number of interactions} \\ = \\ \text{Value created} \end{array}$$

6

HOW AI CHATBOTS DRIVE BUSINESS VALUE

Customers are increasingly turning to chatbots over legacy channels due to their speed, convenience and ease of use. For enterprises, chatbots don't just improve customer experience — they reduce costs and boost productivity.

HOW AI CHATBOTS DRIVE BUSINESS VALUE

Here's how conversational AI-powered chatbots deliver value for businesses and consumers alike:

Instant response times

[62% of customers would prefer to “hand out parking tickets” than wait in an automated phone tree for service or have to repeat themselves multiple times to different team members.](#)

Consumers value speed and convenience when seeking help online. AI chatbots eliminate the barrier between a brand and its customers by providing immediate responses.

Increase revenue

[Global retail spending through conversational commerce channels will reach \\$43 billion by 2028.](#)

Conversational AI chatbots don't just answer questions — they drive growth. By accessing customer accounts and offering tailored product and service recommendations, they can turn interactions into opportunities, increasing sales and revenue.

Keep costs down

[Chatbots offer organizations 20%–30% cost savings on average.](#)

A scalable conversational AI chatbot can do the work of hundreds of human agents, no additional hires needed.

Increase employee efficiency

[Chatbots can handle highly repetitive inquiries, automating anywhere from 60%–80% of all inbound support traffic.](#)

Conversational AI empowers customer self-service, freeing up your team to focus on high-value interactions.

Open up new channels

[68% of people have used an automated service chatbot at least once.](#)

Chatbots empower enterprises to launch fully automated omnichannel experiences for sales, service and support, no extra teams or resources required.

Bolster brand loyalty

[44% of consumers say they would be interested in using chatbots to search for product information before they make purchase decisions.](#)

Chatbots aren't just for customer service. Conversational AI creates dynamic, memorable experiences in every channel, building brand loyalty and bringing customers back for — and spending — more.

Available 24/7, 365

[More than 60% of consumers expect customer service teams to be available 24/7.](#)

In today's connected world, customers expect support on their schedule — not yours. Chatbots are a fast, scalable way to provide service at any time, ensuring your business is always within reach. business when it suits them best.

7

USE CASES AND CASE STUDIES

With the right conversational AI platform, chatbots become powerful tools for supporting customers, driving sales and optimizing organizational efficiency.

See for yourself with these real-world chatbot use cases and success stories across industries.

USE CASES AND CASE STUDIES

Banking, credit unions & financial services

Automate core banking services

From opening an account or reporting a lost card to checking an account balance or processing a mortgage payment, conversational AI empowers customers to manage core banking services through a simple, conversational interface.

Instant personalized service

Deliver instant, accurate answers to customer questions about your products and services. With user authentication, chatbots provide personalized, proactive responses tailored to users' needs and can offer more targeted recommendations over time.

Onboarding and internal support

Boost productivity by combining conversational AI with RPA to automate back-office processes such as document management and contract review. Onboarding new employees is also easy with AI-powered training and knowledge base content built directly into the AI chatbot.

DNB

Case study: DNB

Challenge	Norway's largest bank needed to scale customer support to handle soaring chat volumes.
Solution	Routed all customer service chat traffic through conversational AI chatbot.
Result	<p>The chatbot automated over 50% of all incoming chat traffic in 6 months.</p> <p>It now accounts for 20% of all customer service automation, including channels such as phone and email.</p>

USE CASES AND CASE STUDIES

Insurance

Automate claims processing

Speed and simplicity maintain strong customer relationships. Conversational AI-powered chatbots streamline claims processing by providing instant answers to common questions while interfacing with back-end systems and third-party integrations to fully automate the claims process.

Boost employee productivity

Empower your frontline team with internal chatbots that provide instant access to complex policy structures and documentation. No more waiting on back-office support lines — faster answers translate to increased productivity, consistent information and reduced call times.

Fight fraudulent activity

Conversational AI helps insurers stay ahead of fraud while safeguarding customer privacy. Firms can train NLP and NLU technologies to detect early warning signs and automatically trigger risk mitigation strategies.



Case study: Tryg

Challenge	Denmark's largest insurer needed to reduce complexity for human support staff and increase operational efficiency.
Solution	Deployed an internal AI-powered chatbot to assist customer support staff by answering questions about policy and products without putting customers on hold.
Results	Chatbot answers questions on over 1,200 topics with a 95% success rate and assists over 750 employees daily

USE CASES AND CASE STUDIES

Telecommunications

Powerful upselling potential

Turn customer data into cross-selling opportunities. By combining purchase history and account info with conversational AI, you can offer personalized plans and services customers don't even realize they need.

Increase acquisition rates

Chatbots are more than support tools — they're powerful acquisition channels. By asking targeted questions and providing AI-powered recommendations based on user behavior, chatbots guide potential customers to the products and services that suit them best.

Product and technical support

No more wading through FAQs. Conversational AI can diagnose technical issues and either provide instant solutions or seamlessly transfer customers to the right human operator for further assistance.



Case study: Telenor

Challenge

The largest telecom company in the Nordics needed a seamless, scalable self-service channel.

Solution

Deployed an external AI chatbot with **20+** unique integrations to automate key processes such as PUK code requests, data plan upgrades and viewing invoices.

Result

Chatbot answers questions on more than **2,000** topics and handled over **630,000** inquiries in 2020 alone.

Reached ROI goals in less than **12** months.

USE CASES AND CASE STUDIES

Public sector

Easy access to public data and information

Finding public information on government websites shouldn't be a hassle. Chatbots make it easy for citizens to get answers about everything from new legislation to trash collection schedules, no endless searching or phone calls required.

Extending office opening hours to 24/7

With chatbots, limited office hours are a thing of the past. Chatbots are always on — even on public holidays — and ready to assist citizens at any time, ensuring government services are always available.

Collecting feedback

Need feedback on a new policy? Chatbots transform ordinary conversations into opportunities for civic engagement. Whether soliciting feedback on public services or community issues, chatbots can ensure that citizens' voices are heard.



Case study: Norwegian Labour and Welfare Administration

Challenge

Needed to ensure that businesses and citizens had access to key social benefit programs during COVID-19 pandemic.

Solution

Deployed an AI chatbot to answer questions about pensions, child support, unemployment benefits, employee sick leave and more.

Result

Chatbot handled over **270,000** inquiries at the peak of the pandemic.

Did the work of **220 FTE** with an **80%** success rate, including channels such as phone and email.

USE CASES AND CASE STUDIES

E-commerce

Promote sales and marketing campaigns

Chatbots turn campaigns into conversions. By integrating with your customer relationship management (CRM) system, chatbots can provide personalized product recommendations that align with active sales and marketing campaigns, guiding customers toward what they want most.

Re-engage customers

Don't lose sales to abandoned carts. Conversational AI reminds customers of unfinished orders, provides additional product details as needed and resolves any potential issues that might prevent a customer from completing their purchase.

24/7 order support

With chatbots, support doesn't have to stop when your office closes. Conversational AI can support automated return processes and enables you to assist customers at any time, so they can buy on their schedule, not yours.



Case study: Posten

Challenge

Norway's postal service needed to scale customer service and support during the holiday rush.

Solution

Launched a chatbot with advanced features, including parcel tracking and address changes.

Result

Automated over **370,000** customer service inquiries in December 2019.

Surpassed **1 million** customer interactions in December 2020.

USE CASES AND CASE STUDIES

Healthcare

Provide critical information

Hospitals and clinics can use chatbots to provide accurate, up-to-the-minute information on patient procedures, symptoms, mental health treatments, insurance and more, making vital resources accessible 24/7.

Support doctors

Conversational AI can connect doctors to medical databases, offering immediate answers to queries about symptoms, medications, dosages and treatment options and supporting faster patient diagnosis.

Assist patients

Conversational AI chatbots do more than answer questions — they remind patients to take medications, guide them through treatment plans and more. And, with the help of third-party integrations, chatbots can even monitor patients' overall health, driving better outcomes.



Case study: Västra Götaland

Challenge

Sweden's second-largest county needed a reliable, 24/7 channel for its 1.7 million residents to access information about the latest coronavirus guidelines.

Solution

Developed and launched an AI chatbot in just **6** working days in collaboration with local healthcare professionals.

Result

Automated **800+** conversations per day. Chatbot proved so effective that it was adopted by the wider Swedish population.

8

CHATBOT BEST PRACTICES FOR ENTERPRISE

Building and implementing a chatbot with conversational AI might seem overwhelming — but it doesn't have to be. After hundreds of successful virtual agent implementations across Europe and North America, the boost.ai team has developed best practices to set you up for success.

Follow these steps to deliver your next conversational AI project quickly, efficiently and without compromising quality.

Choose the right use case(s) for your chatbot

Focus on the parts of your organization where automation can deliver the most value and prioritize high-impact use cases, such as:

CHATBOT BEST PRACTICES FOR ENTERPRISE

Service and support (external chatbot)

- Automated first responder
- Automate a portion of customer service and support
- Increase self-service rates
- Increase support capacity
- Cost-effective 24/7 support
- Handle unexpected peaks

Internal knowledge (internal chatbot)

- Centralized knowledge base
- Convenient and anonymous
- HR, IT and payroll support
- Personalized assistance
- Cost-effective 24/7 support
- Handle unexpected peaks
- AI assist with Smart Replies

Sales optimization (external sales chatbot)

- Automated sales
- Self-service and web-form guidance
- Increase up-sell and cross-sell
- Revenue goals with tracking and analytics
- Design and optimize customer journeys



Delivering an AI-powered virtual agent

1. Identify use-case
2. Scope
3. Build

For more information on industry-specific use-cases refer back to chapter 7

CHATBOT BEST PRACTICES FOR ENTERPRISE

Set and agree on a clear scope

Establish the scope and KPIs for your chatbot and ensure everyone is on the same page. This is the time to set goals for your project and determine which resources you'll need. Here's how to stay on track:

- Define what success looks like and set expectations accordingly, so all stakeholders are aligned
- Determine what questions your chatbot needs to answer and what processes it will support
- Identify any challenges that could impede progress before they have the chance to become roadblocks

Assemble the right (dream) team

Success starts with the right people. Build a team that drives your project forward with full buy-in across your organization. While the exact makeup will vary from one organization to the next, this is the structure we recommend for a winning project team:

Internal team

- Executive sponsor (critical)
- Project manager
- Content Designers/AI Trainers
- User testers
- Frontend developer

Every successful project needs a champion. Your executive sponsor should be a senior leader who can drive alignment, clear roadblocks and advocate for conversational AI at every stage.

External resources

- Project manager (optional)
- AI Supervisor/Platform expert
- AI Trainer
- Technical specialists





CHATBOT BEST PRACTICES FOR ENTERPRISE

Integrate your chatbot with your support team

Say goodbye to complicated, developer-dependent chatbot solutions. A conversational AI platform with a low-code or no-code interface empowers your customer service team — your best resource — to take control of chatbot training and maintenance.

These subject matter experts know your customers best and are in the best position to create dynamic conversation flows that deliver exceptional, automated experiences.

Choosing the right KPIs

Your chatbot's success depends on tracking the right metrics. Align your KPIs with the chatbot's intended use case and scope to ensure meaningful impact. Key metrics to measure include:

- Resolution rate
- Deflection rate
- Average handling time
- Reduction in queue times
- Number of sales automated

Also, monitor trends in the types of inquiries your human support team handles. A decrease in repetitive questions after implementation indicates where your chatbot is having the greatest impact.

CHATBOT BEST PRACTICES FOR ENTERPRISE

Chatbot visibility matters

The easier it is for customers to see your chatbot, the more likely they are to use it. Visibility is a core design principle, and it's just as crucial for virtual agents as it is for websites. When chatbots are hard to find, it sends the wrong message: that you don't want customers to get in touch — a cardinal sin in customer service

Follow these best practices to ensure your chatbot stands out:

- **Ensure your chatbot is easy to find on your webpage**
- **Design a visually appealing avatar that is instantly recognizable**
- **Use text to encourage engagement with the chatbot, i.e. "I can help!"**
- **Use dynamic designs such as avatar animation or text pop-ups when hovering over the chatbot**
- **Proactively launch the chat window to grab the customer's attention**

Visibility should align with your KPIs. If you want to automate 50% of inquiries, don't bury your chatbot on your "Contact" page. Place it front and center — ideally, on your homepage — to maximize its impact.

Anticipate and mitigate risks

Every project comes with risks, but planning ahead can turn unexpected roadblocks into manageable challenges. Here's how to build a solid risk mitigation strategy for your chatbot project:

- **Identify and describe potential risks**
- **Determine the probability of how likely it is for a risk to become an issue**
- **Categorize the level of impact the issue might have on the project**
- **Have a plan for which mitigation measures to adopt to deal with different categories of issues**

Consider going 'chat-first'

For the highest ROI, adopt a chat-first approach. Direct all incoming chat traffic through the chatbot before other channels, such as phone or live chat. This strategy automates the maximum number of interactions while ensuring customers are transferred to the right human agent if needed. Many organizations that use this approach successfully automate upwards of 40% of their total customer service, reducing costs while improving efficiency.

CHATBOT BEST PRACTICES FOR ENTERPRISE

Chatbot project pitfalls to avoid

Launching a conversational AI chatbot can dramatically improve customer satisfaction, reduce the burden on your live support team and more — but only with proper planning. Avoid these five common pitfalls to keep your project on time, on budget and within scope:

- **Insufficient planning** - FA lack of planning is a recipe for failure. Create a detailed roadmap for where you want your chatbot to be in 12, 18 or 24 months to reduce risk and failure rates.
- **Scope creep** - Keep your eye on the prize. Focus on delivering core functionality first — you can always add features and functionality to your new chatbot later.
- **Ignoring potential hiccups** - Even the best laid plans can go awry. Identify potential points of failure at the outset of your project and prepare contingency plans to respond to each one.
- **Unclear expectations** -Your C-suite may define success differently than your frontline support team. Define clear, measurable goals as a team so that everyone is in alignment from day one.
- **Thinking in the short term** - What happens after launch? Plan for how you will maintain, improve and scale your chatbot over time to increase its long-term value.



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[The Total Economic Impact™ of boost.ai's Conversational AI Platform](#)

[5 essential steps to enhancing customer interactions with conversational AI](#)

[How conversational AI can significantly improve customer experience in the financial services industry](#)

At boost.ai, we believe conversational AI isn't just about technology — it's about helping real people. By empowering enterprises to deliver smarter, more human-centric services, we're creating solutions that truly understand your customers' needs, exceed their expectations, and strengthen their trust.

Most importantly, our virtual agents don't replace people — they free your teams to focus on what they do best, while delivering the seamless, future-ready experiences your customers expect.

boost.ai. Let's start talking.



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