Survey chatbots: where are we at, and where are we going?

16TH May 2019

Simon Neve, CEO

wizu.com
• Simon Neve from Fusion Software
• 18 years creating customer experience solutions
• Creators of Wizu - the first survey chatbot
What We’ll Cover

• Maturity of wider chatbot industry
• Why use *survey* chatbots?
• Where do chatbots work best / struggle?
• The future of *Survey* Chatbots?
WIDER CHATBOT MATURITY

# Survey chatbot providers in

- 2017: 1
- 2019: 12*

* https://insightplatforms.com/platforms/category/chatbots-solutions
**SURVEY BOT TYPES**

### Forms
- **Quant**
- Menu based
- **Validation: simple**
- Data: Inbound
- Maintenance: low
- Open text reporting: Word cloud
- Bot Skills: none
- **Designer skills: DIY**
- Cost: $

#### Wizard

### Validation
- **Quant + Probing**
- Menu based with some text
- **Validation: Linguistic**
- Data: Inbound
- Maintenance: Some
- Open text reporting: TA
- Bot Skills: 20+
- **Designer skills: DIY +**
- Cost: $$

#### Wizard / NLP

### Model Based
- **Quant + Probing + Prompting**
- Qual
- Text/ voice
- **Validation: Linguistic / Model**
- Data: Inbound/ Outbound
- Maintenance: High / Supervised
- Open text reporting: TA/ Maps
- Bot Skills: 100+
- **Designer skills: Tech / business**
- Cost: $$$

#### NLP / AI / ML

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**Human Mimicry**
**SURVEY BOT TYPES**

**Human Mimicry**

- Forms: Quant
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**Model Based**

- Forms: Quant + NLP + AI + ML + Probing + Prompting → Qual
- Text/ voice
- Validation: Linguistic / Model
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**Menu based**

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**Wizard / NLP + Probing**

- Form: Quant
- Maintenance: Some
- Open text reporting: TA
- Bot Skills: 20+
- Designer skills: DIY +
- Cost: $$

**Simple**

- Forms: Wizard
- Validation: simple
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**Complex**
**Model Based**

- Quant + **Probing** + **Prompting**
- Qual
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- Validation: Linguistic / Model
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**NLP / AI / ML**
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WIDER CHATBOT MATURITY
Chatbots

Survey

Chatbots

???
Hype Cycle for Emerging Technologies, 2018

- AI PaaS
- Conversational AI Platform

gartner.com/SmarterWithGartner

Source: Gartner (August 2018)
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WIDER CHATBOT MATURITY

1. Early in days of Chatbot hype
2. Earlier days of Survey Chatbot hype
3. Both based on maturing technology
WHY *SURVEY* CHATBOTS?

Big problem in the industry: Survey Fatigue

– Affects completion rates
– Affects quality and quantity of verbatims
– Creates speeding
Non-response bias
Case study – Forms vs Chatbot:

- **33%** more verbatim text, **118%** including AI prompts and probes
- **91%** more actionable feedback
Case study – Forms vs Chatbot:

• **57%** rated respondent experience **10/10** compared to **11%** for forms

• Despite being **1min 35s** longer?!

"It’s different and super fun. I want to do more of that survey. I wish it was longer!! I love it a lot!"
How would you rate the experience of taking this survey?

(1-10)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Conversational Survey</th>
<th>Traditional Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
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<td>25-34</td>
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<td>55-64</td>
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<tr>
<td>65+</td>
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</tbody>
</table>

Conversational Survey  Traditional Survey
SURVEY CHATBOTS – WHERE BEST

• Experience
  – Customer / Employee / Patient / Visitor
    - Respondent experience is valued
    - Known domains
    - Reactions based on quality / sentiment
    - Millennials / Gen Z
SURVEY CHATBOTS – WHERE NOT

• Opinion polls
• Very long surveys
SURVEY CHATBOTS - CHALLENGES

• Reporting
  – Text analytics
• Scripting / Humanization 😎
• Survey fatigue open rates
SURVEY CHATBOTS - FUTURE

• More bot surveys
• More *skilful* bots
• Blurring lines between surveys and customer service
SURVEY CHATBOTS - FUTURE

- Model driven feedback
  - Service Design / Digital Twin
  - Model first, then questions
  - Provides understanding / context
  - Customer Journey Maps perfect for model
## CHATBOT EXPERIENCE MODELS

<table>
<thead>
<tr>
<th>Touchpoints</th>
<th>Prepare</th>
<th>Arrive</th>
<th>Presentations</th>
<th>Lunch</th>
<th>Leave</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Visit web site</td>
<td>• Drop coats at cloakroom</td>
<td>• Find seat</td>
<td>• Eat lunch</td>
<td>• Pick coat from cloakroom</td>
<td></td>
</tr>
<tr>
<td>• Read agenda</td>
<td>• Get coffee</td>
<td>• Choose stream</td>
<td>• Speak to sponsors</td>
<td>• Drop lanyard</td>
<td></td>
</tr>
<tr>
<td>• Plan journey</td>
<td>• Connect to Wi-Fi</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Prepare**: Visit website, read agenda, plan journey.

**Arrive**: Drop coats at cloakroom, get coffee, connect to Wi-Fi.

**Presentations**: Find seat, choose stream.

**Lunch**: Eat lunch, speak to sponsors.

**Leave**: Pick coat from cloakroom, drop lanyard.
Intent: “Connect to Wi-Fi”

Entities:
- Wi-Fi
- Network

Verbs:
- Join
- Connect

Reactions:
- Positive: Great 😊
- Negative: Right network?
**MODEL ANALYTICS**

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**Prepare**
- Visit web site
- Read agenda
- Plan journey

**Arrive**
- Drop coats at cloakroom
- Get coffee
- Connect to Wi-Fi

**Presentations**
- Enter main room
- Find seat
- Choose stream

**Lunch**
- Eat lunch
- Speak to sponsors

**Leave**
- Pick up coat from cloakroom
- Drop lanyard
Mirror *human* feedback experience

- Close the loop – real-time
- Two way communication
- Express via Voice / Video
• Survey chatbots are coming here
• Offer a solution to the problem of survey fatigue
• Novelty? Or will respondents be even more discriminatory in future?
• Opportunity for survey industry
ANY QUESTIONS?

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Event example: chat.wizu.com/asc/event