Creating great customer and employee experiences with Virtual Agent

Practical guidance for a successful implementation
Meeting the expectations

Customers today have increasingly high expectations—their questions should be answered easily, quickly, and at any time. But businesses struggle to meet these demands. Support agents are overloaded, continuously handling simple, common requests that could have been resolved through the neglected knowledge bases and support portals.

ServiceNow Virtual Agent—an enterprise chatbot solution—empowers customers, partners, and employees with consistent, scalable, and always-on self-service interactions. Virtual Agent improves service quality and response times by delivering instantaneous responses 24/7, reduces agent workload by automating routine responses, and boosts customer satisfaction through personalized, contextual conversations.
Preparing to create a Virtual Agent

Set the right expectations
Virtual Agent will have the most impact on your business when used to automatically resolve a high volume of routine issues. Your employees and customers already have digital personal assistants such as Siri, Alexa, and Google Home in their lives. But trying to replicate those abilities in Virtual Agent is unlikely to have a high return on investment. Focus your efforts on building specific workflows that will improve business efficiency and increase customer satisfaction.

Understand required resources and skillsets
Many Virtual Agent conversations can be built by non-technical roles like a business analyst, but complex topics that kick off workflows across multiple systems will usually require developers and scripting. Implementation teams should include a mix of these resources:

- Business analysts who gather use cases and map conversation flows
- Service/Process owners who understand the end-to-end flow of a process and can identify success metrics
- Business owner: This role helps define the decision trees, sets the priority for conversations to be built, and is responsible for defining the vision. Depending on the organization, the service or process owner may also take on these responsibilities.
- Virtual Agent developers who are comfortable with JavaScript coding and using the Virtual Agent Designer
- Executive sponsors who provide organizational support for the project
Create a governance plan

As you’re assembling the implementation team, create a document that clearly explains the requirements and procedures for identifying, selecting, and implementing Virtual Agent topics in your organization. This step may seem premature early in the deployment, but will simplify future requests from business units and stakeholders as Virtual Agent adoption increases. A key part of this step is to define how you will monitor and improve the quality of conversations over time.

Identify success metrics

You’ll also need to spend time establishing how to measure the success of your deployment efforts. There are two aspects of this to track: the adoption and quality of the Virtual Agent, and the business impact on cost savings and customer satisfaction. Each should have appropriate targets defined, and ServiceNow Performance Analytics can be used to track and visualize your progress towards these goals.

Adoption of the Virtual Agent can be measured with KPIs such as active users, new users, or conversation sessions, and the quality of the user experience can be captured through user experience survey ratings or metrics such as average handling time and the number of transfers to live agents. These KPIs will serve as leading indicators for the cost savings achieved through high deflection and self-service rates. They also provide early insight into customer satisfaction (CSAT), customer effort score (CES), and net promoter score (NPS).
Designing a Virtual Agent

Discover use cases and select topics
The first step in the design phase is to spend time studying your customers, employees, and organizational data to define and document potential use cases. You can uncover these topic ideas through user interviews, by meeting with agents to discuss their most redundant tasks, and by analyzing existing data about the most common types of incidents or the most actively used knowledge articles. You can then prioritize the list of use cases based on business impact and select a subset of conversations for development.

Create a unique experience and a personality
A key benefit of Virtual Agent is the ability to access and use contextual information such as the user’s profile, location, or items they own to create a more engaging and seamless chat experience. Be sure to consider how and where you can use data from within the Now Platform® to enhance each conversation.

It’s also important to create a recognizable visual identity with your company’s colors and logo while you define a personality and tone for the Virtual Agent’s language. The tone can be playful, professional, or somewhere in between, but it should be applied consistently across all topics and it should always carry empathy. Remember that users are initiating a chat because they need help solving a problem.

Select messaging channels
Virtual Agent can be deployed to your ServiceNow Service Portal, embedded in a web pages and mobile apps, or integrated to where your teams already work—in products such as Slack, Microsoft Teams, and Facebook Workplace Chat. The Virtual Agent can be available in one or more of these channels at the same time, so be sure to discuss which will be enabled.
Map conversation flows

Here you’ll create visual maps that represent the end-to-end flow of each conversation. Virtual Agent ships with conversation topics for IT, customer service, and HR service delivery that you can use as out-of-the-box solutions. But you can also use them as references or starting points for more customized conversations. Visualizing the flow in this step will not only make it easier to build in Virtual Agent Designer, it will also improve the quality of the conversation by identifying any missing paths or potential dead ends.

Considerations during the mapping step:

1. How will users initiate a conversation and which actions will be available?
2. What responses will the Virtual Agent provide to each question?
3. Where will the conversation split based on conditional logic or a decision made by the user?
4. What Now Platform information can be used by the Virtual Agent to personalize and improve the experience?
5. How do responses differ when a search returns no results, one result, or more than one result?
6. When will users be automatically transferred to a live agent?
7. How will users provide feedback about their chat experience?
Building a Virtual Agent

Create conversation flows
Conversations are built in Virtual Agent Designer through drag and drop functionality and JavaScript coding. The interactive canvas allows designers to easily place prompts or responses, rearrange steps, and preview a conversation. Business analysts and service/process owners can build simple conversations without any code or with very little code, while developers assist with complex flows that need scripting.

Follow configuration best practices
You can improve the quality of your conversations by following these recommendations for Virtual Agent Designer:

• Keep your topics small and decision logic as simple as possible.
• Make conversations visually descriptive and easier to debug by separating long blocks of JavaScript code into multiple nodes with shorter code snippets.
• Use script variables for storing static values such as IDs, method names, and limits instead of hardcoding values in scripts.
• Use the native text, link, card, and image outputs instead of custom HTML to create the best visual experience across different messaging clients.
• Avoid inline style references to CSS classes or IDs if you do have a need to use custom HTML.
• Call any REST messages using script includes.

Test and validate
The last step before launching your Virtual Agent is to ensure it is functioning as designed and is effectively solving problems. After exposing the Virtual Agent to a set of test users, you should collect feedback to see if the conversations are flowing smoothly, when and where users might abandon a conversation, and if the users noticed any errors. You can also make use of the gs.debug and gs.info logging files to troubleshoot your conversations.
Launching the Virtual Agent

Promote adoption
Your new Virtual Agent can't support your business goals unless customers and employees are aware it exists. Build and execute a communication plan that leverages your ServiceNow Service Portal, company intranet, office signage, social media, and your web presence to increase awareness and encourage usage. With any kind of campaign, make it easy for users to find and access the conversations through links or QR codes that bring users directly to the Virtual Agent. Clearly establishing a feedback loop within or after each chat will also allow you to understand how users felt about their experience.

Measure usage and impact
Process and service owner stakeholders can use Performance Analytics and the built-in Virtual Agent dashboard to track the KPIs you previously identified such as how many unique users are having conversations, which topics are not being used, and which messaging channels are most active. With that information, you can make informed decisions about how to improve your Virtual Agent.

Iterate and expand
After a successful launch, you can use the data and feedback you’ve collected to continuously refine and improve the conversation topics. Look for ways to reduce error messages and minimize repeated actions, or use A/B testing to validate new path improvements. You can also return to the design phase and increase the value of your Virtual Agent by creating additional topics.
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About ServiceNow
ServiceNow was started in 2004 with the belief that getting simple stuff done at work can be easy, and getting complex multi-step tasks completed can be painless. From the beginning, ServiceNow envisioned a world where anyone could create powerful workflows to get enterprise work done. Today, ServiceNow is the cloud-based platform that simplifies the way we work. ServiceNow software automates, predicts, digitizes, and optimizes business processes and tasks, across IT, customer service, security, human resources, and more, to create a better experience for your employees and customers while transforming your enterprise. ServiceNow is how work gets done.

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