Waterfield Tech

Customer Experience Checklist

Score your customer experience against 48 essential criteria to pinpoint areas for improvement.

© 2022 Waterfield Tech, LLC. All Rights Reserved.

Waterfield Tech

Table of Contents

01	Customer Experience Checklist
02	Functional and Reliable
03	Persona and Brand
04	Conversation Design
05	Who is Waterfield Tech?
06	Book A Conversational Assessment

01

Waterfield Tech

Customer Experience Checklist

SUCCESS CUTS AVERAGE HANDLING TIME, REDUCES TRANSFERS IN THE CALL CENTER AND AUTOMATES MORE CALLS AND TRANSACTIONS - DIRECTLY AFFECTING THE BOTTOM LINE, IMPROVING CUSTOMER EXPERIENCE AND INCREASING CUSTOMER SATISFACTION.

Adopt the perspective of a typical customer, test your conversational apps and answer these simple questions to find out where they shine, where improvements can be made and the areas where you might need expert help.

Ask yourself the following questions during and after your review, tick the boxes that correspond to what you heard and experienced, and calculate your score for each section. At the end, you'll find out what your total score means.

To get the maximum value from this exercise, approach it in the context of a typical customer journey. Pick 3-4 key tasks such as paying a bill or reporting a fault, then get as many stakeholders as possible to walk through those tasks and answer the questions based on their experiences.

Waterfield Tech

02

Waterfield Tech

Functional and Reliable

FUNCTIONAL AND RELIABLE

YOUR SCORE: _ OUT OF 10

IT'S CONVENIENT FOR ORGANIZATIONS TO CONSIDER THEIR COMMUNICATION CHANNELS AS SEPARATE SILOS, BUT CUSTOMERS DON'T THINK THAT WAY. HOW WELL DO YOUR SYSTEMS CURRENTLY PERFORM - AND MORE IMPORTANTLY, HOW WELL DO THEY INTERACT WITH EACH OTHER?

- Is it easy for users to discover how to engage with the system?
- Are they able to use your app to complete their task?
- Is the system available when users need it, rather than often being offline for maintenance?
- It is rare for the system to restart, disconnect, quit or become unresponsive during use?
- Is the system quick to retrieve data, and reference back- end systems?
- When there are database timeouts or other system errors, are users kept informed?
- Is the information presented by the system perceived as complete, consistent, accurate and reliable?
- When receipts and status notifications are offered, do they arrive when expected, without the need for users to get in contact?
- Are users made aware of what the app can and can't do for them?
- For chat systems, is it made clear that users are interacting with an automated system?

Waterfield Tech

03

Waterfield Tech

Persona and Brand

PERSONA AND BRAND

THE PERSONA IS THE CONSISTENT CHARACTER OF ANY SYSTEM. IT'S WHAT PEOPLE TAKE AWAY WHEN THEY USE IT. IT'S NOT JUST THE VOICE OR THE TEXT, IT'S HOW THE SYSTEM COMES ACROSS. WHEN CUSTOMERS CONTACT YOUR ORGANIZATION, IT'S THE JOB OF THE PERSONA TO ACT AS AN EXTENSION OF YOUR BRAND. DOES IT REFLECT WELL?

YOUR SCORE: _ OUT OF 4

- ○ Is the brand personality that's conveyed through the language and layout of the system consistent with the brand attributes used online, on TV, radio, print or in store?
- ○ As the conversation progresses, does the persona come across as having the intelligence and social skill to complete the task?
- ○ Is the voice of the system consistent everywhere? Is the same voice talent or 'text to speech' voice used throughout? Are energy levels the same, do volumes match?
- ○ Overall, is the system perceived as a conversation, as opposed to a speech and text collection tool?

Waterfield Tech

04

Waterfield Tech

Conversation Design

CONVERSATION DESIGN

The customer wants their inquiry dealt with efficiently and accurately, and good conversation design is essential to making that possible.

Getting it right starts with understanding customers and respecting their time.

Listen and watch for opportunities to bring interactions more in line with how customers think rather than how internal business processes are orchestrated.

Waterfield Tech

WORD CHOICE

YOUR SCORE: _ OUT OF 6

DO THE PROMPTS SOUND LIKE SOMETHING YOUR PERSONA WOULD SAY?

- ○ Is "Plain English" used instead of "Tech" or "insider" jargon?
- ○ Are informal verbs (like 'get') and everyday speech used throughout, instead of formal verbs (like 'receive') and conventions of written grammar?
- ○ Are recurring words and phrases clear, consistent and meaningful to the user?
- ○ Have contractions like 'don't' rather than 'do not' been used to make the conversation easier and more natural to say out loud?
- ○ Have pronouns like 'it', 'one', 'he' and 'she' been used to replace the use of nouns that have already been introduced?
- ○ Have you removed redundant words and phrases that are naturally implied and understood when experienced within the conversation?

  E.g., if you're in a coffee shop - you don't need to keep mentioning 'coffee' because it's already implied by the fact, you're having a conversation about buying coffee.

Waterfield Tech

KEEP TRACK OF CONTEXT

YOUR SCORE: _ OUT OF 7

- ○ Does the persona keep track of what has been said as the conversation progresses, rather than questions feeling isolated and context insensitive?
- ○ Are discourse markers used to signal and manage events in the conversation? E.g. First, Second..., By the way, Also, Else, Now, Well, So, Actually, and Sorry.
- ○ Are pointer words and time adverbs (then, this, that, here and there) used to draw attention to WHEN and WHERE events have or will take place?
- ○ Have pitch, rhythm, stress, pace and pauses been used to load words and phrases with additional meaning?
- ○ Is the persona's tone of voice appropriate for each task, rather than coming across as rude or disingenuous?
- ○ Have you removed any long pauses of silence in the interaction that could impact user confidence?
- ○ Has the audio experience been crafted to be heard? Does it leverage the way we use breaks between words, numbers, dates and amounts when we talk, rather than reusing audio files from other areas of the app with little care for how they sound to the user?

Waterfield Tech

INFORMATION STRUCTURE & COGNITION

YOUR SCORE: _ OUT OF 13

- ○ Is it intuitive to use? Can users avoid learning complex new commands or memorizing multiple items?
- ○ Does it make use of familiar real-world strategies to help users quickly orientate themselves and make sense of information? For example, metaphors like desktops, toolbars and bookmarks can improve memory and recall.
- ○ Are similar tasks carried out in the same way?
- ○ Is the conversation easy to understand?
- ○ Are interactions brief and to the point, providing just the right amount of detail to progress the conversation while remaining relevant, orderly, and avoiding ambiguity?
- ○ Are instructions provided clearly before jumping into the detail?
- ○ When dense or lengthy detail is provided, does the user clearly benefit from it?
- ○ Is information clear and uncluttered? Is simple information placed before the complex? Generic before specific? And is old or known information introduced before new?
- ○ Are the most frequent options listed first?
- ○ Are options with the most vital information given focus?
- ○ Are topic groupings logical? For example, are options sequential - like ‘Press one, press two, press three' - ?
- ○ If systems use touch tone, are button presses given after the topic? i.e. "For Sales, press one.” not ‘Press one for Sales’.
- ○ Is help offered to nudge users away from bad choices and towards good decisions?

Waterfield Tech

ERROR AND RECOVERY

YOUR SCORE: _ OUT OF 5

SOME EXAMPLES...

NO RESPONSE FROM THE CALLER: ‘LET ME GIVE YOU THOSE OPTIONS AGAIN.’

INCORRECT RESPONSE: ‘I’M NOT FINDING A MATCH TO THAT NUMBER IN THE SYSTEM.’

UNEXPECTED RESPONSE: 'SORRY, I NEED THE CARD NUMBER -THAT’S THE LONG NUMBER ON THE FRONT OF THE CARD.’

- When users provide unexpected, ambiguous or more information than requested, does the system respond sensitively and offer progressive and helpful advice to help diagnose and recover from the situation?
- If the user provides no response, or hesitates, does the dialog help to diagnose and progress the situation?
- Is the user always given enough time to respond? Does the system always allow enough time for the user to complete their response without disrupting the natural flow of dialog?
- When in trouble, users fall back on prior knowledge. Can users say universal commands like ‘Repeat’, ‘Help’, Start over’, ‘Go back’ ‘Advisor’ ‘I’m done’, ‘STOP’ and ‘CANCEL’?

Waterfield Tech

FREQUENT USERS

YOUR SCORE: _ OUT OF 3

- Can novice and frequent users both get to where they need quickly and easily?

- Does the system use customer data to help drive the experience?

  For example, if calling an airline, the system already knows that I'm scheduled to fly that day and prioritizes my options.

- Does the design have added efficiencies for frequent users?

  For example, recognizing a user from their virtual assistant profile or incoming phone number, providing short-cuts based on contact patterns, and providing more efficient dialog in frequent paths.

Waterfield Tech

YOUR TOTAL SCORE

LIKE A MUSICAL INSTRUMENT, CONVERSATION DESIGNS ARE SUSCEPTIBLE TO GOING OUT OF TUNE.

THIS EXERCISE WILL HAVE IDENTIFIED A NUMBER OF IMPROVEMENT AREAS FOR YOUR ORGANIZATION.

ALL HAVE THE POTENTIAL TO IMPROVE HARD BUSINESS OUTCOMES BY DELIVERING A BETTER AND MORE EFFICIENT CUSTOMER EXPERIENCE.

Waterfield Tech

So, how did you score against these 48 essential conversation design criteria?

0-20

From the customer’s perspective, it sounds like the experience isn’t great. Maybe you should consider a more thorough assessment to find out exactly where your system is falling short and what you can do to bring it up to expectations.

20+

Seems like your customers are in good hands (but there is still room for improvement and cost savings.)

05

Waterfield Tech

Who’s Waterfield Tech

DATA DRIVEN CONVERSATION DESIGN ON ANY PLATFORM

We're an experienced group of design experts and technologists who believe there's a better way of delivering automated customer experiences. And we've successfully accomplished that for a wide range of consumer brands around the world.

We help you engage customers in automated conversations that make them happy, loyal advocates of your brand. Working with your existing team and technology, we deliver a better customer experience through data-driven conversation design and optimization.

If you're serious about putting your customer first, while keeping costs down, we can help.

Find out more about Waterfield Tech at www.waterfieldtech.com.

IVR

CHAT

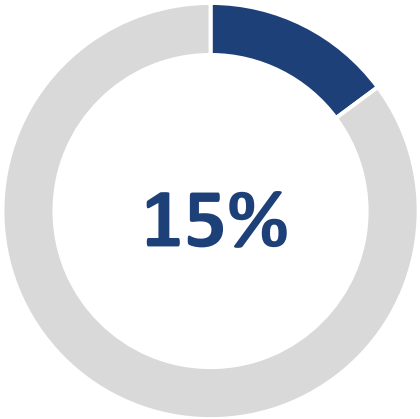
SMS

ASSISTANT

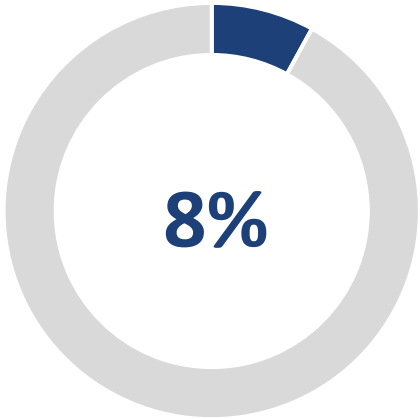
Waterfield Tech

Waterfield Tech

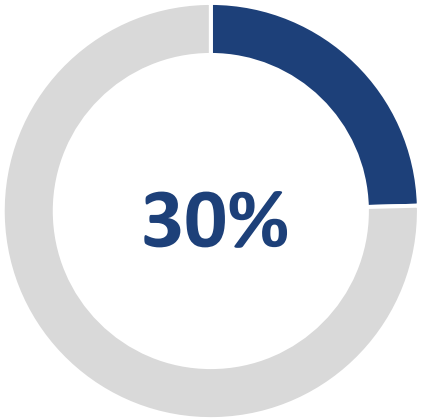
WATERFIELD TECH CLIENTS ENJOY...



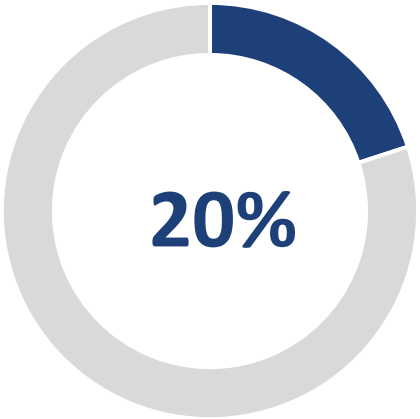
REDUCTION IN SERVICE COST



INCREASE IN CUSTOMER SATISFACTION



REDUCTION IN INBOUND CALLS



INCREASE IN SELF-SERVICE RESOLUTIONS

FLOW Allstate Walgreens SHOP DIRECT

Waterfield Tech

GET STARTED WITH A FREE REVIEW

Put your customer channels to the test. Pick your channel: IVR, SMS, Chat or an existing voice assistant.

We'll put it through its paces and report back to you on:

- How well are your conversational channels working for you and your customers?
- Is voice first right for your business?
- What are others in your industry doing?
- What's the best way to get started?

SCHEDULE REVIEW NOW